



# Synapsys CRM jXchange

09/25/2024

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# Services Provided

The following table lists the services that Synapsys currently provides.

Category	Services	Minimum Synapsys Version	Minimum Prod EBO Version/Metadata Version
Ping	Ping	2017.1.0	2017.0.03
Customer	CRMCustSrch	2014.1.27	2014.0.08
	CRMCustInq	2018.3.0	2018.5.03
Prospect	CRMProspSrch	2014.1.27	2014.0.08
	CRMProspInq	2014.1.27	2014.0.08
	CRMProspAdd	2015.4.0	2015.0.07
	CRMProspMod	2015.4.0	2015.0.07
Service Events	CRMEventSrch	2014.1.27	2014.0.08
	CRMEventInq	2014.1.29	2014.0.08
	CRMEventAdd	2014.1.29	2014.0.08
	CRMEventMod	2014.1.29	2014.0.08
Sales Events	CRMEventSrch	2014.1.27	2014.0.08
	CRMEventInq	2016.1.0	2015.0.07
	CRMEventAdd	2016.1.0	2016.0.09
	CRMEventMod	2016.1.0	2014.0.08
Contact Events	CRMEventSrch	2014.1.27	2014.0.08
	CRMEventInq	2017.3.0	2017.2.03

<b>Category</b>	<b>Services</b>	<b>Minimum Synapsys Version</b>	<b>Minimum Prod EBO Version/Metadata Version</b>
	CRMEventAdd	2017.3.0	2017.2.03
	CRMEventMod	2017.3.0	2017.2.03
Incentive Events	CRMEventSrch	2014.1.27	2014.0.08
Campaign Activity	CRMActSrch	2014.1.27	2014.0.08
	CRMActMod	2014.1.27	2014.0.08
	CRMActInq	2014.1.29	2014.0.08
Mailing Activity	CRMActAdd	2014.1.31	2015.0.03
	CRMActInq	2020.1.0.0	2020.1.0.0
	CRMActMod	2020.1.0.0	2020.1.0.0
Meeting Activity	CRMActSrch	2017.1.0	2014.0.08
	CRMActInq	2017.4.0	2017.2.03
	CRMActAdd	2017.4.0	2017.2.03
	CRMActMod	2017.4.0	2017.2.03
Note Activity	CRMActSrch	2017.1.0	2014.0.08
	CRMActInq	2018.2.0	2018.4.01
	CRMActAdd	2014.1.31	2015.0.03
	CRMActMod	2018.2.0	2018.4.01
Phone Activity	CRMActSrch	2017.1.0	2018.4.01
	CRMActInq	2017.3.0	2017.2.03
	CRMActMod	2017.3.0	2017.2.03
	CRMActAdd	2017.3.0	2017.2.03

<b>Category</b>	<b>Services</b>	<b>Minimum Synapsys Version</b>	<b>Minimum Prod EBO Version/Metadata Version</b>
Referral Activity	CRMReferSrch	2014.1.29	2014.0.08
	CRMReferInq	2014.1.29	2014.0.08
	CRMReferAdd	2014.1.29	2014.0.08
	CRMReferMod	2014.1.29	2104.0.08
Lobby Queue	Search	2018.4.0	2018.7.05
	Inq	2018.4.0	2018.7.05
	Add	2018.4.0	2018.7.05
	Mod	2018.4.0	2018.7.05
PSOs	CRMPotSaleSrch	2014.1.27	2014.0.08
User Operation Inquiry	UserOperInq	2015.4.0	2014.0.08
Client Related Data	CRMClientRelDataInq	2021.2.0.0	2021.10.7941.166
	CRMClientRelDataMod	2021.2.0.0	2021.10.7941.166
Ticklers	CRMRmndSrch	2022.2.0.0	2022.13.8339.226
	CRMRmndMultiInq	2022.2.0.0	2022.13.8339.226
	CRMRmdMod	2022.2.0.0	2022.13.8339.226

# Related Documents

Additional documents related to this *User Guide* are included in the *jXchange Vendor Packet*.

# About this Guide

This Synapsys jXchange *User Guide* provides information about configuring and working with Synapsys CRM Services.

# Purpose

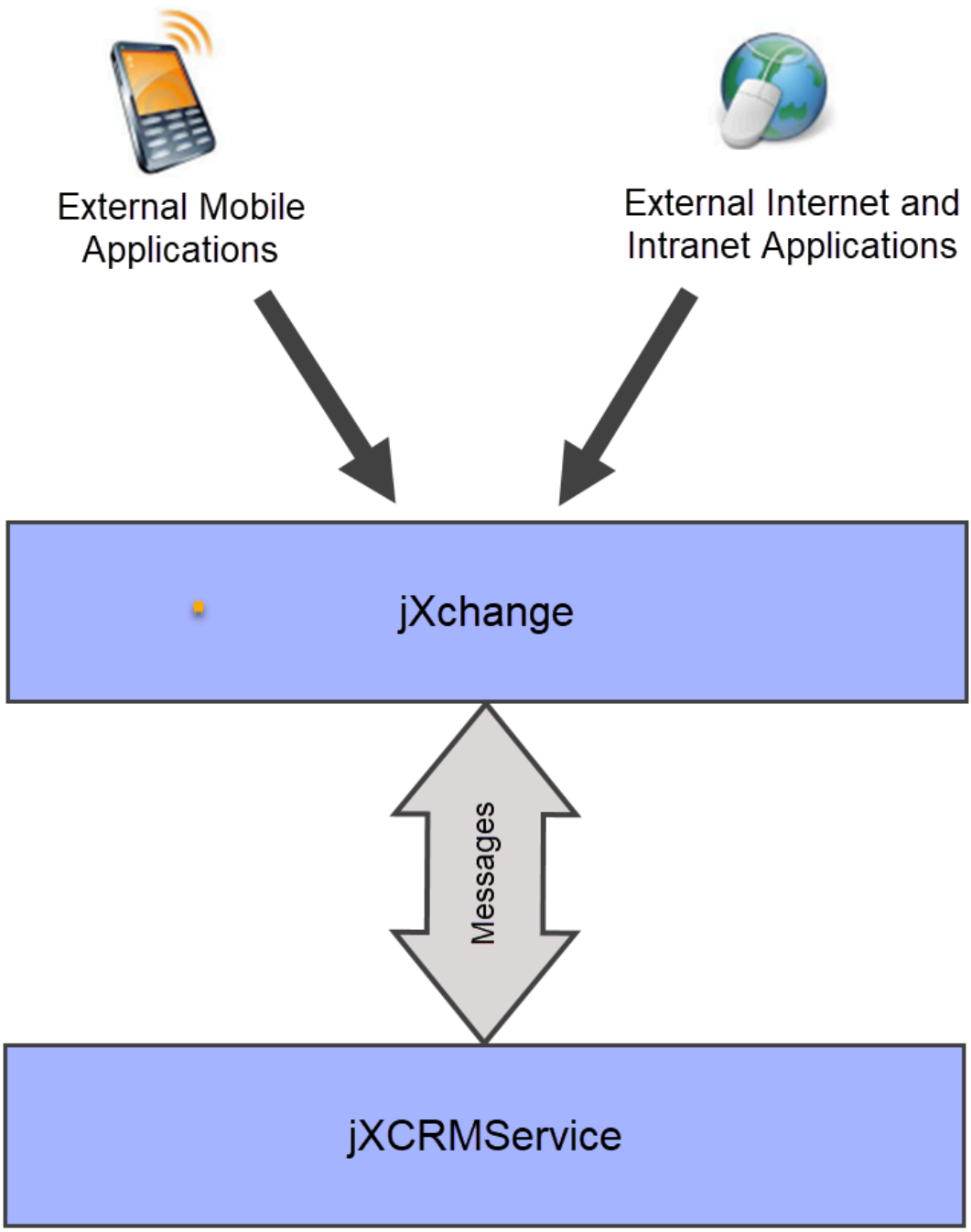
The purpose of this document is to provide the implementation, standards, and operations of the Synapsys CRM Services.

The information in this manual is instructional in nature and designed for third-party vendors to evaluate the interface using a web-based messaging system for interfacing with the Synapsys CRM Services through jXchange.

This document is not designed to be a primer for consuming web services nor a programming teaching tool. These topics are beyond the scope of this document.

# Overview – What is the Synapsys CRM Service?

Synapsys has created a service that exposes Synapsys CRM through jXchange, allowing authorized external service consumers to request CRM functionality via web service requests for integration into any desired Synapsys interface.

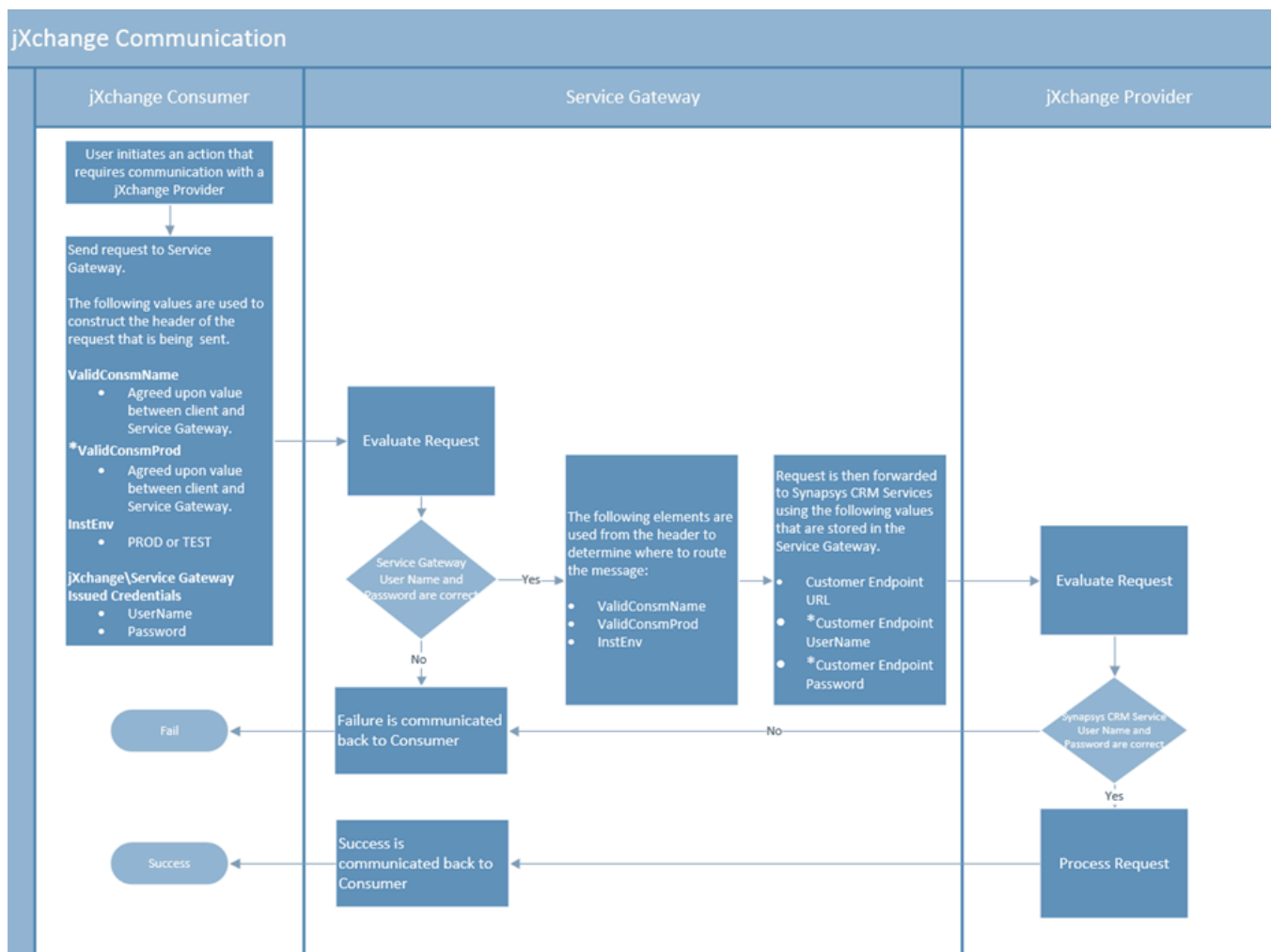


# Set up Synapsys CRM Services

Use the information found in this user guide to set up Synapsys CRM Services properly.

## How a Consumer Communicates with a Provider

The following diagram provides an overview of the communications between a consumer and a jXchange provider.



When you are ready to become a consumer of the Synapsys CRM Services, a series of steps must be completed to install the service. Credentials must also be acquired and set up within the Service Gateways and Synapsys.

## Symitar Dependencies

There are several dependencies for any Symitar client who wants to use Synapsys jXchange with the Symitar MBRKey.

If a client chooses to use Branch Anywhere or the jXchange services, the following must apply:

- Your CIS.0000 must be modified to include the Symitar MBRNumber.
- You must be on Microsoft® SQL Server® Integration Services (SSIS).

## Install and Configure Synapsys

Use the information found in this user guide to install necessary Synapsys applications and configure the appropriate settings.

### Install the JXCRMServices

Use the Synapsys Web Application setup utility to deploy the JXCRMServices web services. The URL where the services are deployed is provided to Service Gateway to be stored in the Customer Endpoint URL.

### Configure Consumer Settings

Configure your consumer settings by accessing them in the Synapsys System Maintenance.

These settings are credentials that are provided to Service Gateway, where they are validated prior to routing any requests to the Synapsys CRM Services.

Consumer settings are found on the **System Maintenance > Integration > Credentials** screen.

### Product (Required)

This element represents the name of the product that you have selected to provide to Service Gateway.

This product name is also passed in the **ValidConsProd** element for each service request

that is sent through the Service Gateway. The product name being sent in the request must match what is stored in the Service Gateway before it is permitted to continue to the Customer Endpoint URL.

## Description (Required)

This element represents a friendly description that you can use to provide more information on the selected product name. It is strictly informational and not used in any communication.

## UserName (Required)

This element represents the user name that you have selected to provide to Service Gateway.

This user name is also passed in each service request that is sent through the Service Gateway. The user name being sent in the request must match what is stored in the Service Gateway as the **Customer Endpoint UserName** before it is permitted to continue to the endpoint URL.

### NOTE

This user name is different than the user name used to access Service Gateway.

## Password (Required)

This element represents the password that you have selected to provide to Service Gateway.

This password is also passed in each service request that is sent through the Service Gateway. The password being sent in the request must match what is stored in the Service Gateway as the **Customer Endpoint Password** before it is permitted to continue on to the endpoint URL.

## Permissions Levels (Required)

This element should be set to *Internal* unless you are directed differently.

## Officer Defaults (Optional)

This element represents the officer to use for each request that is sent if the consumer opts

not to send an IMS token in the header.

If an officer is not defined, a valid Synapsys Associate must be sent in one of the following ways:

- Contained in the IMS token that is sent
- Synapsys Associate code within the **AuthenUsrCred** element

## Service Gateway

Synapsys must be set up as a service provider on the Service Gateway jXchange Management Console.

## Customer Endpoint URL

This URL represents the service endpoint where the Synapsys CRM Services are hosted. The URL must be modified to include the following three items.

### Secure Endpoint

<http://SERVERNAME/WebFolder/2008> must become <https://SERVERNAME/WebFolder/2008>

### Fully Qualified Domain Name

<https://SERVERNAME/WebFolder/2008> must become <https://SERVERNAME.jhacorp.com/WebFolder/2008>

### Include Customer.svc File

The URL <https://SERVERNAME.jhacorp.com/WebFolder/2008> must become <https://SERVERNAME.jhacorp.com/WebFolder/2008/Customerv.svc>.

## Customer Endpoint UserName

This element represents the user name that is set up in the *jXchangeConsumerSettings* table.

# Customer Endpoint Password

This element represents the password that is set up in the *jXchangeConsumerSettings* table.

# Error Handling

Error handling is covered in detail in the *jXchange Error Handling Document* that is included in the *Vendor Packet*.

## Fault Behaviors

Error handling for errors has been designed into the messaging structure and involves notification through use of codes, categories, and descriptions and options for error overrides for non-fatal errors.

Note that warning and [override-able] fault message information is returned in the Message Record Information Array `MsgRecInfoArray_AType` while all unhandled exceptions and errors are thrown as SOAP faults in the Fault Record Information Array `FaultRecInfoArray_AType`.

The error values specific to the Synapsys CRM Services business operations can be found by performing a Service Dictionary Search. This search returns all fault codes by service operation.

# Authentication and Identification

Use the information found in this user guide to complete all authentication and identification requirements.

## Authentication

The service customer is expected to perform all subscriber authentication, while jXchange performs authentication on the consumer level (e.g., channel or institution level). As such, it is assumed that all unique identifiers provided for the financial institution and subscriber have been authenticated prior to receipt of the request message by Synapsys.

In turn, Synapsys performs service authentication to ensure that a valid source (e.g., jXchange) calls/passes the service request.

## Authorization

Synapsys authorizes the service consumer via a shared security token generated and passed by jXchange and ensures that the consumer has a valid relationship with the financial institution identified in the service request.

## Identification

Synapsys validates the institution and, if applicable, subscriber identification for each request message received.

In addition to the elements required by jXchange, the following elements are required in the `jXchangeHdr_CType` portion of the Message Request Header (`MsgRqHdr`). These requirements enable Synapsys to validate each request message.

## `jXchangeHdr_CType`

The following simple elements contained within the `jXchangeHdr_CType` complex are required by Synapsys CRM Services.

## **ValidConsmProd**

This element represents the name of the product which is consuming the service (business product name) for the soap header. Entries must be in canonical form as defined by the service consumer.

## **InstRtId**

This element represents the identification of the entity of the submitted message. A financial institution entity uses the routing transit or nine-digit number assigned to financial institutions for the purpose of routing as assigned by the American Bankers Association.

Any leading zeros must be provided for a complete routing and transit number. A non-financial institution entity should use a mutually agreed upon identification that must contain at least one non-integer character.

When a record is for a specific financial institution within a holding company, the **InstRtId** is the specific financial institution routing identification and not the holding company's identification.

# Service Behaviors

The service process is a basic process in Synapsys jXchange. It is how all data is defined.

## Canonicals

Where canonical values are required within the Synapsys CRM services operations, the value submitted must match the expected canonical value exactly. Any invalid canonical value (as with any invalid data) causes an error, unless explicit behavior has been defined that indicates using the default value if data is invalid.

There are two types of canonicals utilized for all service operations in jXchange (and therefore, the Synapsys CRM Services): *ClosedEnums* and *OpenEnums*.

## ClosedEnums

There is a definite set of values and only those values are used on the request and response messages between a consumer and provider.

The closed enumerated values are defined in the jXchange and XSD contract in the form of annotations. The fixed values are the only data set that a consumer of these elements must understand. An error is returned when a value is delivered in a message that the Synapsys CRM Services does not understand.

The closed enumeration values are used by the Synapsys CRM Services in accordance with the existing jXchange framework to determine how to invoke an operation. The following behaviors go along with this.

- If the element is not sent or sent empty and is required, a fault error is returned.
- If the element is not sent or sent empty and is optional, a default error is used.
- If the element is sent with an incorrect value, a fault error is returned.

The web service call – Service Dictionary Search (**SvcDictSrchrq**) provides the means for a consumer to query for the Synapsys closed enumerated values within the Synapsys CRM Services. The details for using this request message can be found in the Service Dictionary Search section.

## OpenEnums

There is a definite set of values, but those values are not represented (annotated) in the contract. These values have the potential to change over time. If a defined value is sent on the request or response, that value is used. However, if an undefined value is sent, Synapsys sends an error back to the consumer indicating that the value is invalid.

Open enumeration elements are generally suffixed with **Code**. The element that is suffixed with **Code** has a mate element that is suffixed with **Desc**. This convention is used because a service provider field is often represented as a code that does not convey its representation. As a result of using these suffixes, the service provider returns the description of the code that is a literal value that the customer can understand.

The web service call Service Dictionary Search (**SvcDictSrchRq**) provides the means for a consumer to query for the Synapsys open enumerated values within the Synapsys CRM Services. The details for using this request message can be found in the following Service Dictionary Search section.

## Nulls

Synapsys requires an explicit declaration of a null value to specify when an element must be modified to a null value and therefore, not modify an existing element if this null value is missing.

The WC3 XML Schema standard mechanism, **xsi:nil** = *True*, can be utilized to explicitly assign a value of null to an element rather than using an empty element to implicitly assign a value to null.

## JHANull Attribute

The use of jXchange's **JHANull** attribute notifies the business service to remove the stored value for the associated element.

**JHANull** may only be utilized for modification requests within the Synapsys CRM Services.

The behavior expectation for XML elements in a modification service:

- If the element is not sent, is empty, or is sent as **xsi:nil** = *True*, the message is conveyed to the service provider (Synapsys) to do nothing.
- If the element is sent with **JHANull** = *True*, the message is conveyed to the service

provider (Synapsys) to clear the stored value and set the element to a null value.

The behavior expectation for XML elements in an addition service:

- Synapsys does not support **JHANull** in any addition service.

The behavior expectation for deleting XML elements in an array in a modification service:

- Synapsys does not support **JHANull** in arrays that are part of a modification service.

## **Rstr Attribute Behavior**

The **Rstr** attribute is used to decorate parent and/or child elements to convey to the consumer any existing user accessibility policies. By default, the child elements inherit the attribute values that are applied to a parent element. Partial (**Part**) attribute values allow child elements to override the inherited default value by specifying a different attribute value. This behavior is only available for inquiry and search operations.

The following are canonical values.

### **NoAccess**

Access is denied. This attribute value may exist in a parent element or a child element.

### **NoAccessPart**

Access is denied. This attribute value can only exist on parent elements.

### **ReadWrite**

Full read and write access is granted. This attribute value may exist in a parent element or a child element. This is the default attribute value if no value is set and no inheritance is implied.

### **ReadWritePart**

Full read and write access is granted. This attribute value can only exist on parent elements.

## ReadOnly

Read-only access is granted. This attribute value can exist in a parent element or a child element.

## ReadOnlyPart

Read-only access is granted. This attribute value can only exist on parent elements.

## Hid

The element is hidden. This attribute value differs from the *NoAccess* value as it conveys to the consumer that they should hide from the end user the existence of any of the parent and/or child elements.

A child element does not inherit any attribute values when the parent node inherits the *Hid* value. The choice of displaying or not displaying elements with this attribute value is entirely left to the discretion of the consumer's application presentation to the end user. The consumer's application may hide the metadata as well as the data.

## OvrrdInstRtId Attribute Behavior

In multibank scenarios, the **OvrrdInstRtId** attribute is used to indicate a different institution for an element than the **InstRtId** in the message header.

## MaskVal Attribute

The **MaskVal** attribute is used to indicate how a value is masked when being displayed.

The attribute displays the masked value. The element contains the unmasked value. Masking options are configured in Synapsys.

Values that can be configured for masking include the following:

- **TaxID**
  - *Mask All*
  - *Mask First Five*
  - *No Masking*
- **DOB**

- *Mask All*
- *No Masking*
- **Address**
  - *Mask All*
  - *No Masking*
- **City**
  - *Mask All*
  - *No Masking*
- **State**
  - *Mask All*
  - *No Masking*
- **Zip**
  - *Mask All*
  - *No Masking*
- **Country**
  - *Mask All*
  - *No Masking*
- **Account Number**
  - *Mask All*
  - *No Masking*

The following table includes examples of how the **MaskVal** attribute appears in a response. The attribute appears the same way for all elements listed above.

Value	Masking Example
No Masking	<TaxId MaskVal="123456789">123456789</TaxId>
Mask First Five	<TaxId MaskVal="*****6789">123456789</TaxId>
Mask All	<TaxId MaskVal="*****">123456789</TaxId>
Masking for Prospect that Begins	<TaxId MaskVal="S12345678">S12345678</TaxId>

Value	Masking Example
with an S	* <b>SSNum</b> masking does not apply if the <b>SSNum</b> begins with <b>S</b> (indicating a temporary number for a prospect).

## Search/Inquiry Behaviors

The search/inquiry process is a basic process in jXchange. It is how all data is retrieved.

### [object] Search

The service consumer performs this search to get a subset list of the desired object (clients, events, activities, etc.) based on client-specific search criteria.

### [object] Inquiry

Once the service consumer has the desired list of the specific object identified, the consumer sends the corresponding inquiry message to receive detailed information on an individual object.

If the required individual identifier for an entity is already known (**TaxId**, **CustId**, **CRMEventId**, or **ActivityId**), it is not necessary to perform the search service prior to requesting the inquiry service for the given entity.

The Synapsys CRM Services utilize the following fault responses for search and inquiry requests:

- All search and inquiry requests return an error message when the request contains an identifier (institution, subscriber, etc.) that does not exist. The message indicates which element is invalid (invalid subscriber ID, etc.).
- All search and inquiry requests return a warning when the institution and/or subscriber identifiers are valid, but the information requested (**Scheduled Payments** in a certain date range, specific **Payee Name**, etc.) does not exist. The message indicates that *no records match selection criteria*.

# Modification Behaviors

The Modification process is a basic process in jXchange. It is how all eligible data is updated (**DIt** = *False*) or deleted (**DIt** = *True*).

The Activity Intention Key (**ActIntentKey**), which is provided by the service provider, is required for every modification request. Therefore, an inquiry request for the desired data set must always be performed prior to the modification requesting order to retrieve the Activity Intent Key necessary for modification processes.

The use of JHANull is expected in a modification request to explicitly indicate that an element is intended to be removed.

Modification of individual elements within an array item, or update of the array item itself, must be indicated as follows:

- If an array record is new and contains values that are currently not saved in Synapsys, those values are saved.
- If an existing array item is included in the modification request and one or more changes are noted for individual elements within the array item, updates are made to those elements only.
- It is not currently possible to remove array items that have been previously saved.

## NOTE

jXchange's concurrency model is not supported within Synapsys CRM Services. However, Synapsys provides the Activity Intent Key in response to every inquiry request that extends beyond read-only activity.

# Synapsys CRM Services

The jXchange messaging structures and protocols for general utilization of jXchange web services are provided in the documentation included in the Vendor Packet. The service consumer is expected to adhere to these messaging structures and protocols for all Synapsys CRM Services service operations.

The service operation information that follows provides detailed information about expected behaviors specific to each Synapsys CRM Service business service operation. As such, this document addresses only those elements and/or protocols that are explicitly required for use within the Synapsys CRM Services. It can be assumed that any elements that exist in a given message schema that are NOT referenced in this document are not required for use within the Synapsys CRM Services.

## Consumer Services

Synapsys has messaging services for search and inquiry of consumer information on service providers.

## Service Dictionary Search

**Container: TPG\_CustomerMaster.xsd**

**Message: SvcDictSrch**

The Service Dictionary Search is a jXchange messaging service designed to provide the service consumer with a service that can convey a service provider's elements, XSD path, requirements, default values, open and closed enumerated canonical values, help/knowledge content, and fault codes per operation.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## Message Flow

Message flow involves the exchange of `MTType` messages between the third-party consumer and the service provider.

## Service Dictionary Search Request

`SvcDictSrchrq_MType`

The consumer sends the `SvcDictSrchrq_MType` message containing the required **SvcDictName** and **SvcDictType** elements.

## Service Dictionary Search Response

`SvcDictSrchrS_MType`

The service provider sends the `SvcDictSrchrS_MType` message containing an echo of the request, plus `SvcDictInfoArray`.

## Request

The third-party consumer forwards the `SvcDictSrchr` request message containing the following.

- **SvcDictName** (required)
- **SvcDictType** (required)
- **ElemName** (optional)
- `SvcDictFilterArray` (required in certain scenarios)

The following simple elements are contained within the `SvcDictSrchr` request message.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	CRMAcType	Description
8128	Error	Meeting	<code>EnableMeetings</code> is set to false.
8134	Error	Note	<code>EnableNotes</code> is set to false.

Error ID	Category	CRMActType	Description
8160	Error	Phone and Note	<i>The financial institution has chosen not to enable Sales Events.</i>
8166	Error	Phone, Note, Message, and Meeting	<i>The financial institution has chosen not to enable Contact Events.</i>
8179	Error	Phone	<i>EnablePhoneLog is set to false.</i>
8195	Error	Message	<i>The financial institution has chosen not to enable Referral Activities.</i>
8196	Error	Phone, Note, Message, and Meeting	<i>The officer permission AllowRelEx is set to False.</i>
8201	Error	Phone, Note, Message, and Meeting	<i>The officer does not have permission to view an event with this EventCatCode.</i>
8205	Error	Client Interests, Extended Information	<i>The officer permission AllowExtCISView is set to False.</i>
8206	Error	Client Interests, Extended Information	<i>The officer permission AllowExtCISModify is set to False.</i>

### **SvcDictName (Required)**

This element represents the Synapsys CRM Services operations that can be queried to obtain data dictionary definitions.

The **SvcDictName** must be specified to receive information on elements, including the lists of enumerated canonical values, for the desired service operation.

The ability to receive a global list of enumerated values for all elements within the Synapsys CRM Services (by leaving the **SvcDictName** filter blank) is not supported.

Valid values for **SvcDictName** are:

- *CRMActAdd*
- *CRMActInq*
- *CRMActMod*
- *CRMEventAdd*
- *CRMEventMod*
- *CRMReferAdd*
- *CRMReferMod*
- *CRMrmndMod*
- *LobbyQueAdd*
- *LobbyQueMod*
- *CRMClientRelDataMod*

## **SvcDictType (Required)**

This element represents the desired service dictionary operation type.

Canonical values are:

- *Rq* (request)
- *Rs* (response)

If the value is set to *Rq*, the response message returns information related to the elements for the service consumer's request specified by the **SvcDictName**. If the value is set to *Rs*, the response message returns information related to the elements that would be returned in the service provider's response message specified by the **SvcDictName**.

## **ElemName (Optional)**

The request also includes the optional simple element **ElemName**, so that a consumer could query for information related to a specific element.

## **SvcDictFilterArray (Required in Certain Scenarios)**

This array is a collection of additional information that allows a consumer to restrict a query for specific values that have a correlation to an operation and contains the

`SvcDictFilterInfo` complex element.

## SvcDictFilterInfo

The `SvcDictFilterInfo` contains a collection of additional information that can be used to restrict a query and contains the following simple elements.

### SvcDictFilterCode

This element represents a specific filter that is valid for a particular service to restrict the results for the service being queried.

The following are possible filters that are unique to each service.

## CRMActAdd

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMActAdd</i>	<i>CRMActType</i>	

## CRMActInq

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMActInq</i>	<i>CRMActType</i>	

## CRMActMod

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMActMod</i>	<i>CRMActType</i>	

## CRMActSrch

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMActSrch</i>	<i>CRMActType</i>	

## CRMCustSrch

**SvcDictFilterCode** is not supported for this service.

## CRMEventAdd

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventAdd</i>	<i>CRMEventType</i>	

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventAdd</i>		<i>EventCatCode</i> <i>EventOffCode</i> <i>TaxId</i> <i>CustId</i>
<b>ElemName</b>	=	<i>EventCatCode</i>		
<b>SvcDictFilterInfo</b>				
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		
<b>SvcDictFilterVal</b>	=	<i>Svc</i>		

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventAdd</i>	<i>EventCatCode</i>	<i>EventCatCode</i> <i>EventPrivType</i> <i>TaxId</i>
<b>SvcDictFilterInfo</b>				
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		
<b>SvcDictFilterVal</b>	=	<i>Svc</i>		

Element		Value	Required	Optional
				<i>CistId</i> <i>EventOffCode</i> <i>EventCatCodeDesc</i>

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventAdd</i>	<i>CRMEventAdd</i>	<i>EventCatCode</i>  <i>CategoryId</i>
<b>ElemName</b>	=	<i>EventCatCode</i>		
<b>SvcDictFilterCode</b>	=	<i>EventCatCode</i>		
<b>SvcDictFilterVal</b>	=	<i>CategoryId</i> (Provides the Category Description of the CategoryId)		

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventAdd</i>	<i>EventCatCode</i>	<i>TaxId</i>  <i>CustId</i>
<b>ElemName</b>	<>	<i>EventCatCode</i>		
<b>SvcDictFilterInfo</b>				
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		
<b>SvcDictFilterVal</b>	=	<i>Svc</i>		

# CRMEventMod

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventMod</i>	<i>CRMEventType</i>	<i>EventPrivType</i>

## Contact Events

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventMod</i>	<i>CRMEventID</i> ( <i>EventID</i> )	<i>EventCatCode</i>
<b>SvcDictFilterInfo</b>				<i>EventPrivType</i>
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		<i>EventOffCode</i>
<b>SvcDictFilterVal</b>	=	<i>Contact</i>		

## Sales Events

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventMod</i>	<i>CRMEventID</i> ( <i>EventID</i> )	<i>EventCatCode</i>
<b>SvcDictFilterInfo</b>				<i>EventPrivType</i>
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		<i>EventOffCode</i>
<b>SvcDictFilterVal</b>	=	<i>Sale</i>		

## Service Events

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventMod</i>	<i>EventCatCode</i>  or <i>CRMEventID</i>	<i>TaxId</i>
<b>SvcDictFilterInfo</b>				<i>CustId</i>
<b>SvcDictFilterCode</b>	=	<i>CRMEventType</i>		<i>EventOffCode</i>
<b>SvcDictFilter</b>	=	<i>Svc</i>		

Element		Value	Required	Optional
				<i>CRMEventId</i> <i>EventCatCode</i> <i>EventPrivType</i>

## CRMEventSrch

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMEventSrch</i>	<i>CRMEventType</i>	

## CRMPotSaleSrch

**SvcDictFilterCode** is not supported for this service.

## CRMReferAdd

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMReferAdd</i>		<i>ReferOffCode</i>

## CRMReferMod

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMReferMod</i>	<i>ReferId</i>	<i>ReferOffCode</i>

## CRMReferSrch

**SvcDictFilterCode** is not supported for this service.

## CRMRmndMod

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMRmndMod</i>		
<b>SvcDictFilterInfo</b>				
<b>SvcDictFilterCode</b>	=	<i>CRMItemtype</i>		
<b>SvcDictFilterVal</b>	=	<i>Rmnd</i> <i>CustCon</i> <i>Incen</i> <i>Sale</i> <i>Svc</i> <i>Cmpgn</i> <i>Note</i> <i>Meet</i> <i>Msg</i> <i>Phone</i>	<i>CRMItemtype</i>	

## CRMClientRelDataMod

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>CRMClientRelDataMod</i>	<i>CRMClientId</i>	

Element		Value	Required	Optional
			<i>CRMClientType</i>  <i>XtendElem</i>	

## LobbyQueAdd

Element		Value	Required	Optional
<b>SvcDictName</b>	=	<i>LobbyQueAdd</i>	<i>BrCode</i>	

### SvcDictFilterVal

This element represents a specific value to be associated with the filter provided in **SvcDictFilterCode** and is used to restrict the results for the service being queried.

## Response

The service provider (Synapsys) returns the *SvcDictSrch* response message to the service consumer, which returns the following items.

### SvcDictInfoArray

This array provides dictionary information for the named service *SvcDictName* and includes the *SvcDictInfoRec* complex element, which contains dictionary information for each element in the service.

### SvcDictInfoRec

The *SvcDictInfoRec* complex element contains a package of data related to the named service *SvcDictName* and includes the following arrays, complex elements, and simple elements.

## ElemName

This element is available for the named service (**SvcDictName**).

## ElemPath

This element path is specified in **ElemName** for the named service (**SvcDictName**).

## ElemReq

This element indicates whether the element specified in **ElemName** is required for the named service **SvcDictName**.

Canonical values are:

- *True*
- *False*

## ElemDft

This element indicates the default value associated with the element specified in **ElemName** for the named service **SvcDictName**.

### CAUTION

Date values are not supported starting with releases after 01/01/2023.

## ElemDftDt

This element indicates the date of the default value associated with the element specified in **ElemName** for the named service **SvcDictName**.

## ElemLowRngVal

When provided, the value indicates the low range of values to be accepted for a given element.

## ElemLowRngDt

When provided, the value indicates the date for the low range of values to be accepted for a given element.

## ElemHighRngVal

When provided, the value indicates the high range of values to be accepted for a given element.

## ElemHighRngDt

When provided, the value indicates the date for the high range of values to be accepted for a given element.

## ElemHelpInfo

Synapsys currently uses this element to provide helpful information regarding parsing the **SvcDictSrch** response.

## x\_SvcPrvdFldInfo

The `SvcDictInfoRec` complex element contains a package of data related to the provider's database storage information for a specific element (**ElemName**) for the named service **SvcDictName** and includes the following simple elements.

## SvcPrvdFldName

## SvcPrvdFldName

This element represents the name of any field that may store data related to the element (**ElemName**) for the named service (**SvcDictName**).

## SvcPrvdTblName

## SvcPrvdTblName

This element represents the name of any table that may store data related to the element (**ElemName**) for the named service (**SvcDictName**).

## SvcPrvdFldDesc

## SvcPrvdFldDesc

This element represents a brief description of any field that may store data related to the

element (**ElemName**) for the named service (**SvcDictName**).

## SvcPrvdFldType

## SvcPrvdFldType

This element represents the data type of any field that may store data related to the element (**ElemName**) for the named service (**SvcDictName**).

Canonical values are:

- *int*
- *String*
- *Date*
- *Time*
- *Dec*
- *URI*

## SvcPrvdFldLen

## SvcPrvdFldLen

This element represents the length of any field that may store data related to the element (**ElemName**) for the named service (**SvcDictName**).

### **x\_SvcPrvdErrArray**

This array controls whether you see warnings, faults, or errors for the particular element. The array is only included in the response if it was requested in the request.

### **ElemCanocType**

This element represents the service provider's canonical type for the specified element.

Canonical values are:

- *Open*
- *Closed*
- *NA*

## ElemCanocArray

This array includes the `ElemCanocRec` for each element, which provides the list of canonical values and corresponding descriptions.

## ElemCanocRec

## ElemCanocRec

The `ElemCanocRec` complex element contains a package of data related to an element and includes the following simple elements.

## ElemCanocVal

## ElemCanocVal

This element represents the canonical value for the specific element.

## ElemCanocValDesc

## ElemCanocValDesc

This element represents the description of the canonical value for the specific element.

## CanocValInfoArray

## CanocValInfoArray

This array includes **CanocValInfoRec**, which is used to tie additional information related to the **ElemCanocVal**.

## CanocValInfoRec

## CanocValInfoRec

The `CanocValInfoRec` complex element contains a package of additional data related to an element and includes the following simple elements.

## CanocValDetail

# CanocValDetail

This element represents the type of additional information that is being provided. An example that may be found here is **DataType**.

# CanocValTxt

# CanocValTxt

This element represents the additional information that is related to the **ElemCanocVal**. An example that may be found here is **Integer**.

## Examples of User-Defined Fields

User-defined fields allow you to customize what is returned in a `SvcDictSrch` request message.

- **Data Type**
  - Text
  - Date
  - Number
  - Integer
  - Value List (returns a list of configured values)
  - Branch (returns a list of the organization’s branches)
  - Officer (returns a list of the organization’s associates)
  - Application (returns a list of the organization’s applications)
  - Client Account (when a client is specified, returns a list of the client’s accounts)
- **Required**
  - Required
  - Required when the event has a terminating status
- **Other Field Settings**
  - Default Selection – indicates if the value list has a default value.
  - Presentation Ordinal – indicates the order that the items are listed.

UserDefCode	ElemCanocVal Desc	Data Type	UserDefTxt	ElemCanocVal
1395	UD Value List	UDList	8678	One

UserDefCode	ElemCanocVal Desc	Data Type	UserDefTxt	ElemCanocVal
1395	UD Value List	UDList	8679	Two
1396	UD Text	Text		
1397	UD Date	Date		
1398	UD Number	Number		
1399	UD Branch	Branch		
1400	UD Officer	Officer		
1401	UD Application	Application		
1402	UD Client Account	Client Account		
1403	UD Integer	Integer		

Example of a User-Defined Field from the SvcDictSrch Response

```

<ElemCanocRec>
  <ElemCanocVal>1402</ElemCanocVal>
  <ElemCanocValDesc>UD Client Account</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>ClientAccount</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>254</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Group 1</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>10</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>80</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>DataLength</CanocValDetail>
      <CanocValTxt>0</CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
      <Ver_1 />
    </CanocValInfo>
  </CanocValInfoArray>
  <Ver_1 />
</ElemCanocRec>

```

The following CRMEventAdd example populated the fields in the previous example.

### Example of the CRMEventAdd

```

<UserDefInfoArray>
  <UserDefInfo>
    <UserDefTxt>8678</UserDefTxt>
    <UserDefCode>1395</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>Here is the text</UserDefTxt>
    <UserDefCode>1396</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>09/04/2025</UserDefTxt>
    <UserDefCode>1397</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>2.22</UserDefTxt>
    <UserDefCode>1398</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>1</UserDefTxt>
    <UserDefCode>1399</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>MKS</UserDefTxt>
    <UserDefCode>1400</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>Savings</UserDefTxt>
    <UserDefCode>1401</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>1473886</UserDefTxt>
    <UserDefCode>1402</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1>2</UserDefInfo1>
    <UserDefInfo2>2</UserDefInfo2>
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt>1234</UserDefTxt>
    <UserDefCode>1403</UserDefCode>
    <UserDefDesc xsi:nil="true" />
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
  </UserDefInfo>
</UserDefInfoArray>

```

Example of the CRMEventInq for this Event

```

<UserDefInfoArray>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8678</UserDefTxt>
    <UserDefCode>1395</UserDefCode>
    <UserDefDesc>8678</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">Here is the text</UserDefTxt>
    <UserDefCode>1396</UserDefCode>
    <UserDefDesc>Here is the text</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">9/4/2025 12:00:00 AM</UserDefTxt>
    <UserDefCode>1397</UserDefCode>
    <UserDefDesc>9/4/2025 12:00:00 AM</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
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    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
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    <UserDefCode>1398</UserDefCode>
    <UserDefDesc>2.22</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
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    <UserDefCode>1399</UserDefCode>
    <UserDefDesc>1 - Branch 1</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">MKS</UserDefTxt>
    <UserDefCode>1400</UserDefCode>
    <UserDefDesc>Michelle Scott - MKS -- 0086</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">4</UserDefTxt>
    <UserDefCode>1401</UserDefCode>
    <UserDefDesc>Savings</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">1473886 - CheckingMoney/Market(REGULAR CHECKING)</UserDefTxt>
    <UserDefCode>1402</UserDefCode>
    <UserDefDesc>1473886 - CheckingMoney/Market(REGULAR CHECKING)</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 Rstr="ReadWrite">0</UserDefInfo1>
    <UserDefInfo2 Rstr="ReadWrite">0</UserDefInfo2>
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
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    <UserDefCode>1403</UserDefCode>
    <UserDefDesc>1234</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
</UserDefInfoArray>

```

## Dependency Value List

When a dependency value list is used, the values available for **Field 2** depend on the value selected in **Field 1**.

For example, **Field 1** is **Favorite Color** with options of *Blue, Red, Green, or Yellow*. **Field 2** is **Which Shade** with options of *Sky Blue, Navy Blue, Cardinal Red, Rusty Red, Forest Green, Lime Green, Pale Yellow, Golden Yellow*.

- If *Blue* is selected for **Field 1**, the options for **Field 2** are *Sky Blue* and *Navy Blue*.
- If *Green* is selected for **Field 1**, the options for **Field 2** are *Forest Green* and *Lime Green*.

<b>UserDefCode</b>	Returns the information fields <b>Favorite Color</b> and <b>Which Shade</b> .
<b>UserDefTxt</b>	Returns an array with the values for the <b>UserDefCode</b> fields.

When **CanocValDetail** = *UserDefCodeDependency*, **CanocValTxt** contains the code of the **Parent Detail Entry Id** to indicate if this field depends on a parent field.

When **CanocValDetail** = *UserDefTextDependency*, **CanocValTxt** contains the code of the **Parent Detail Entry Id** to indicate if this field depends on a parent field.

*Navy Blue* has a *UserDefCodeDependency* of **1528, Favorite Color**.

*Navy Blue* has a *UserDefTextDependency* of **8722, Blue**.

UserDef Code	ElemCanocV alDesc	UserDefTxt	ElemCanocV al	UserDefCode Dependency	UserDefCode Dependency Value	UserDefText Dependency	UserDefText Dependency Value
1528	Favorite Color	8722	Blue				
1528	Favorite Color	8723	Red				
1528	Favorite Color	8724	Green				
1528	Favorite Color	8725	Yellow				
1529	Which Shade	8726	Sky Blue	1528	Favorite Color	8722	Blue
1529	Which Shade	8727	Navy Blue	1528	Favorite Color	8722	Blue
1529	Which Shade	8728	Cardinal Red	1528	Favorite Color	8723	Red
1529	Which Shade	8729	Rusty Red	1528	Favorite Color	8723	Red
1529	Which Shade	8730	Forest Green	1528	Favorite Color	8724	Green

<b>UserDef Code</b>	<b>ElemCanocV alDesc</b>	<b>UserDefTxt</b>	<b>ElemCanocV al</b>	<b>UserDefCode Dependency</b>	<b>UserDefCode Dependency Value</b>	<b>UserDefText Dependency</b>	<b>UserDefText Dependency Value</b>
1529	Which Shade	8731	Lime Green	1528	Favorite Color	8724	Green
1529	Which Shade	8732	Pale Yellow	1528	Favorite Color	8725	Yellow
1529	Which Shade	8733	Golden Yellow	1528	Favorite Color	8725	Yellow

## Example of the UserDefined Fields from the SvcDictSrch Response

```

<SvcDictInfoRec>
  <ElemName>UserDefCode</ElemName>
  <ElemPath>CRMEventInfoRec.UserDefInfoArray.UserDefInfo.UserDefCode</ElemPath>
  <ElemReq>False</ElemReq>
  <ElemCanocType>Open</ElemCanocType>
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1528</ElemCanocVal>
      <ElemCanocValDesc>Favorite Color</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>UDList</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>False</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCatCode</CanocValDetail>
          <CanocValTxt>269</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupName</CanocValDetail>
          <CanocValTxt>Group 1</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
          <CanocValTxt>10</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
          <CanocValTxt>10</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RequireAtTermination</CanocValDetail>
          <CanocValTxt>False</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>DataLength</CanocValDetail>
          <CanocValTxt>0</CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
          <CanocValTxt></CanocValTxt>
          <Ver_1 />
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>Blue</ElemCanocVal>
    <ElemCanocValDesc>Blue</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>1528</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefTxt</CanocValDetail>
        <CanocValTxt>8722</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsDefaultSelection</CanocValDetail>
        <CanocValTxt>False</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefCodeDependency</CanocValDetail>
        <CanocValTxt></CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefTxtDependency</CanocValDetail>
        <CanocValTxt></CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
        <CanocValTxt></CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>Navy blue</ElemCanocVal>
    <ElemCanocValDesc>Navy blue</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>1529</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefTxt</CanocValDetail>
        <CanocValTxt>8727</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsDefaultSelection</CanocValDetail>
        <CanocValTxt>False</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefCodeDependency</CanocValDetail>
        <CanocValTxt>1528</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefTxtDependency</CanocValDetail>
        <CanocValTxt>8722</CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
        <CanocValTxt></CanocValTxt>
        <Ver_1 />
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>

```

The following example includes the selection of *Blue* for **Favorite Color** and *Navy Blue* for **Which Shade**.

## Example of the CRMEventAdd

```

<TaxId>S10012667</TaxId>
<CRMEventType>Svc</CRMEventType>
<CRMEventInfoRec>
  <CRMEventDesc>Added through JX CRMEventAdd</CRMEventDesc>
  <EventCrtOffCode>MKS</EventCrtOffCode>
  <EventOffCode>MKS</EventOffCode>
  <EventCmnt>Added through JX CRMEventAdd</EventCmnt>
  <CRMEventRecv>False</CRMEventRecv>
  <EventDueDt>2023-10-25</EventDueDt>
  <EventStatCode>390</EventStatCode>
  <EventCatCode>269</EventCatCode>
  <UserDefInfoArray>
    <UserDefInfo>
      <UserDefTxt>8722</UserDefTxt>
      <UserDefCode>1528</UserDefCode>
      <UserDefDesc xsi:nil="true" />
      <UserDefDt xsi:nil="true" />
      <UserDefInfo1 xsi:nil="true" />
      <UserDefInfo2 xsi:nil="true" />
      <UserDefInfo3 xsi:nil="true" />
    </UserDefInfo>
    <UserDefInfo>
      <UserDefTxt>8727</UserDefTxt>
      <UserDefCode>1529</UserDefCode>
      <UserDefDesc xsi:nil="true" />
      <UserDefDt xsi:nil="true" />
      <UserDefInfo1 xsi:nil="true" />
      <UserDefInfo2 xsi:nil="true" />
      <UserDefInfo3 xsi:nil="true" />
    </UserDefInfo>
  </UserDefInfoArray>

```

Example of the CRMEventInq for this Event

```

<EventDueDt Rstr="ReadWrite">2023-10-25</EventDueDt>
<EventStatCode Rstr="ReadWrite">390</EventStatCode>
<EventCatCode>269</EventCatCode>
<UserDefInfoArray>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8722</UserDefTxt>
    <UserDefCode>1528</UserDefCode>
    <UserDefDesc>8722</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8727</UserDefTxt>
    <UserDefCode>1529</UserDefCode>
    <UserDefDesc>8727</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
</UserDefInfoArray>

```

## Conditionally Displayed

A field can be configured to appear based on the value selected in the parent field. For example, if *Yes* is selected in **Field 1**, **Field 2** and **Field 3** appear. If *No* is selected in **Field 1**, **Field 2** and **Field 3** do not appear, but **Field 4** does appear.

The options of *Yes* or *No* are available for **Do you like ice cream?**

- If *Yes* is selected, the fields **Favorite Flavor** and **Options** appear.
- If *No* is selected, the field **Do you like frozen yogurt?** appears.

When **CanocValDetail** = *ConditionallyDisplayedByUserDefCode*, **CanocValTxt** indicates the field that is controlling whether the conditionally displayed fields appear or not.

When **CanocValDetail** = *ConditionallyDisplaysUserDefCode*, **CanocValTxt** indicates the fields that appear when this value is selected.

**Do you like ice cream?** (1530) is not conditionally displayed so there is no **CanocValTxt** value.

*Yes* is a choice for **Do you like ice cream?** (1530).

*Yes* has *ConditionallyDisplaysUserDefCode* **Favorite Flavor** (1531) and **Options** (1532).

Both **Favorite Flavor** (1531) and **Options** (1532) have a **ConditionallyDisplayedByUserDefCode** of *1530* which is **Do you like ice cream?**

<b>UserDef Code</b>	<b>ElemCanocValDesc</b>	<b>UserDefTxt</b>	<b>ElemCanocVal</b>	<b>Conditionally Displays UserDefCode</b>	<b>Conditionally Displays UserDefCode Value</b>
1530	Do you like ice cream?	8734	Yes		
1530	Do you like ice cream?	8735	No		
1531	Favorite Flavor	8736	Vanilla	8734	Yes
1531	Favorite Flavor	8737	Chocolate	8734	Yes
1531	Favorite Flavor	8738	Strawberry	8734	Yes
1531	Favorite Flavor	8739	Cookie Dough	8734	Yes
1531	Favorite Flavor	8740	Mint Chip	8734	Yes
1531	Favorite Flavor	8741	Fudge Swirl	8734	Yes
1532	Options	8742	Cone	8734	Yes
1532	Options	8743	Bowl	8734	Yes
1534	Do you like frozen yogurt?	8746	Yes	8735	No
1534	Do you like frozen	8747	No	8735	No

UserDef Code	ElemCanocValDesc	UserDefTxt	ElemCanocVal	Conditionally Displays UserDefCode	Conditionally Displays UserDefCode Value
	yogurt?				

## Example of the User-Defined Fields from the SvcDictSrch Response

```

<ElemName>UserDefCode</ElemName>
<ElemPath>CRMEventInfoRec.UserDefInfoArray.UserDefInfo.UserDefCode</ElemPath>
<ElemReq>False</ElemReq>
<ElemCanocType>Open</ElemCanocType>
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>1530</ElemCanocVal>
    <ElemCanocValDesc>Do you like ice cream?</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValText>UDList</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsRequired</CanocValDetail>
        <CanocValText>False</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCatCode</CanocValDetail>
        <CanocValText>270</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDGroupName</CanocValDetail>
        <CanocValText>Conditional Several</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
        <CanocValText>10</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
        <CanocValText>10</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>RequireAtTermination</CanocValDetail>
        <CanocValText>False</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DataLength</CanocValDetail>
        <CanocValText>0</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
        <CanocValText></CanocValText>
        <Ver_1 />
      </CanocValInfo>
    </ElemCanocRec>
  </ElemCanocArray>
</ElemCanocRec>
  <ElemCanocRec>
    <ElemName>UserDefTxt</ElemName>
    <ElemPath>CRMEventInfoRec.UserDefInfoArray.UserDefInfo.UserDefTxt</ElemPath>
    <ElemReq>False</ElemReq>
    <ElemCanocType>Open</ElemCanocType>
    <ElemCanocArray>
      <ElemCanocRec>
        <ElemCanocVal>Yes</ElemCanocVal>
        <ElemCanocValDesc>Yes</ElemCanocValDesc>
        <CanocValInfoArray>
          <CanocValInfo>
            <CanocValDetail>UserDefCode</CanocValDetail>
            <CanocValText>1530</CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>UserDefTxt</CanocValDetail>
            <CanocValText>8734</CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>IsDefaultSelection</CanocValDetail>
            <CanocValText>False</CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>UserDefCodeDependency</CanocValDetail>
            <CanocValText></CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>UserDefTxtDependency</CanocValDetail>
            <CanocValText></CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
            <CanocValText>1531</CanocValText>
            <Ver_1 />
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
            <CanocValText>1532</CanocValText>
            <Ver_1 />
          </CanocValInfo>
        </CanocValInfoArray>
      </ElemCanocRec>
    </ElemCanocArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>1531</ElemCanocVal>
    <ElemCanocValDesc>Favorite Flavor</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValText>UDList</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsRequired</CanocValDetail>
        <CanocValText>False</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCatCode</CanocValDetail>
        <CanocValText>270</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDGroupName</CanocValDetail>
        <CanocValText>Conditional Several</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
        <CanocValText>10</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
        <CanocValText>20</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>RequireAtTermination</CanocValDetail>
        <CanocValText>False</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DataLength</CanocValDetail>
        <CanocValText>0</CanocValText>
        <Ver_1 />
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
        <CanocValText>1530</CanocValText>
        <Ver_1 />
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>

```

The following example includes the selection of *Yes* for **Do you like ice cream?**, *Mint Chip* for **Flavor**, and *Cone* for **Options**.

## Example of the CRMEventAdd

```

<TaxId>S10012667</TaxId>
<CRMEventType>Svc</CRMEventType>
<CRMEventInfoRec>
  <CRMEventDesc>Added through JX CRMEventAdd</CRMEventDesc>
  <EventCrtOffCode>MKS</EventCrtOffCode>
  <EventOffCode>MKS</EventOffCode>
  <EventCmnt>Added through JX CRMEventAdd</EventCmnt>
  <CRMEventRecv>False</CRMEventRecv>
  <EventDueDt>2023-10-25</EventDueDt>
  <EventStatCode>390</EventStatCode>
  <EventCatCode>270</EventCatCode>
  <UserDefInfoArray>
    <UserDefInfo>
      <UserDefTxt>8734</UserDefTxt>
      <UserDefCode>1530</UserDefCode>
      <UserDefDesc xsi:nil="true" />
      <UserDefDt xsi:nil="true" />
      <UserDefInfo1 xsi:nil="true" />
      <UserDefInfo2 xsi:nil="true" />
      <UserDefInfo3 xsi:nil="true" />
    </UserDefInfo>
    <UserDefInfo>
      <UserDefTxt>8740</UserDefTxt>
      <UserDefCode>1531</UserDefCode>
      <UserDefDesc xsi:nil="true" />
      <UserDefDt xsi:nil="true" />
      <UserDefInfo1 xsi:nil="true" />
      <UserDefInfo2 xsi:nil="true" />
      <UserDefInfo3 xsi:nil="true" />
    </UserDefInfo>
    <UserDefInfo>
      <UserDefTxt>8742</UserDefTxt>
      <UserDefCode>1532</UserDefCode>
      <UserDefDesc xsi:nil="true" />
      <UserDefDt xsi:nil="true" />
      <UserDefInfo1 xsi:nil="true" />
      <UserDefInfo2 xsi:nil="true" />
      <UserDefInfo3 xsi:nil="true" />
    </UserDefInfo>
  </UserDefInfoArray>
</CRMEventInfoRec>

```

Example of the CRMEventInq for this Event

```

<EventStatCode Rstr="ReadWrite">398</EventStatCode>
<EventCatCode>270</EventCatCode>
<UserDefInfoArray>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8734</UserDefTxt>
    <UserDefCode>1530</UserDefCode>
    <UserDefDesc>8734</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8740</UserDefTxt>
    <UserDefCode>1531</UserDefCode>
    <UserDefDesc>8740</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
  <UserDefInfo>
    <UserDefTxt Rstr="ReadWrite">8742</UserDefTxt>
    <UserDefCode>1532</UserDefCode>
    <UserDefDesc>8742</UserDefDesc>
    <UserDefDt xsi:nil="true" />
    <UserDefInfo1 xsi:nil="true" />
    <UserDefInfo2 xsi:nil="true" />
    <UserDefInfo3 xsi:nil="true" />
    <Ver_1 />
  </UserDefInfo>
</UserDefInfoArray>

```

## User Accessibility Inquiry

**Container:** TGP\_InquiryMaster.xsd

**Message:** UsrOperInq

The user accessibility inquiry service is a jXchange messaging service designed to provide the service consumer with a method to determine in advance if a specific authenticated user has the rights to access the desired Synapsys CRM Service.

The `UsrOperInqRq_MType` request message allows for multiple inquiries for the same specific authenticated user with an array.

The `AuthenUsrCred` contained within the header is used to determine the specific user.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## Message Flow

Message flow involves the exchange of `MType` messages between the third-party consumer and the service provider.



## Request

The third-party consumer forwards the `UsrOperInq` request message containing an array of records with the following complex and simple elements.

- **Oper** (required)
- `OperFilterArray` (required in certain scenarios)

The following simple elements are contained within the `UsrOperInq` request message.

### **UserOperInqRecArray (Required)**

This array is a collection of information used to identify a specific service being targeted for a specific user and contains the `UsrOperInqRqRec` complex element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

### **UsrOperInqRqRec (Required)**

This element contains a collection of specific information targeting a specific service and contains the following simple elements.

#### **Oper**

This element represents a specific jXchange Synapsys CRM service.

Valid values for **Oper** are:

- CRMActAdd
- CRMActInq
- CRMActMod
- CRMActSrch
- CRMCustInq
- CRMCustSrch
- CRMEventAdd
- CRMEventInq
- CRMEventMod
- CRMEventSrch
- CRMPotSaleSrch
- CRMProspAdd
- CRMProspInq
- CRMProspMod
- CRMProspSrch
- CRMReferAdd
- CRMReferInq

- CRMReferMod
- CRMReferSrch
- LobbyQueSrch
- LobbyQueInq
- LobbyQueAdd
- LobbyQueMod
- CRMClientRelDataInq
- CRMClientRelDataMod
- CRMRmndSrch
- CRMRmndMultiInq
- CRMRmndMod

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

### **OperFilterArray (Required in Certain Scenarios)**

This array is a collection of information that is used to further identify a specific service that is being targeted in the **Oper** element and contains the `OperFilterInfo` complex element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8129	Error	<i>This element is required.</i>
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

# OperFilterInfo

## OperFilterInfo

The **OperFilterInfo** contains a collection of additional filters used to further identify a specific service that is being targeted in the **Oper** element and contains the following simple elements.

# OperFilterType

## OperFilterType

This element represents a specific filter that is used to identify a specific service.

The following possible filters are unique to each service.

Element	Value	Required Value for OperFilterType	Optional Values for OperFilterVal	
<b>Oper</b>	=	<b>CRMActType</b>	<i>Cmpgn</i> <i>Meet</i> <i>Note</i> <i>Phone</i>  <i>CustCon</i> <i>Incen</i>	
				<i>CRMActAdd</i>
				<i>CRMActInq</i>
				<i>CRMActMod</i>
		<i>CRMActSrch</i>		
		<b>CRMEventType</b>		<i>CRMEventInq</i>
<i>CRMEventAdd</i>				

Element	Value	Required Value for OperFilterType	Optional Values for OperFilterVal
	<i>CRMEventMod</i>		<i>Sale</i>
	<i>CRMEventSrch</i>		<i>Svc</i>
	<i>CRMActAdd</i>	<b>CRMActType</b>	<i>Msg</i>
	<i>CRMActMod</i>		
	<i>CRMActSrch</i>		
	<i>CRMClientRelDataInq</i>	<b>XtendElem</b>	<i>XtendInfoArray</i>
	<i>CRMClientRelDataMod</i>		<i>ClientIntArray</i> <i>ClientDemogrArray</i>
	<i>CRMrmndMultiInq</i>	<b>CRMItemType</b>	<i>Rmnd</i>
	<i>CRMrmndMod</i>		<i>Svc</i> <i>Sale</i> <i>CustCon</i> <i>Incen</i> <i>Note</i>

Element	Value	Required Value for OperFilterType	Optional Values for OperFilterVal
			<i>Msg</i> <i>Phone</i> <i>Meet</i> <i>Cmpgn</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## OperFilterVal

## OperFilterVal

This element represents a specific value to be associated with the filter provided in **OperFilterType** and is used to further identify a specific service that is being targeted in the **Oper** element.

Valid values have been provided with the valid values for **OperFilterType** listed previously.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## Response

The service provider (Synapsys) returns the `UsrOperInq` response message to the service consumer, which returns the following elements.

### UsrOperInqRecArray

This array provides a collection of user accessibility information and includes the `UserOperInqRqRec` complex element, which contains specific user accessibility information for each specific service (**Oper**).

### UsrOperInqRqRec

The `UsrOperInqRqRec` complex element contains a package of data related to the named service (**Oper**) and includes the following simple elements.

### Oper

This simple element represents the name of the element that is available for the named service (**Oper**).

The following are values for **Oper**.

- CRMActAdd
- CRMActInq
- CRMActMod
- CRMActSrch
- CRMCustInq
- CRMCustSrch
- CRMEventAdd
- CRMEventInq
- CRMEventMod
- CRMEventSrch
- CRMPotSaleSrch
- CRMProspAdd
- CRMProspInq
- CRMProspMod
- CRMProspSrch
- CRMReferAdd

- CRMReferInq
- CRMReferMod
- CRMReferSrch
- LobbyQueSrch
- LobbyQueInq
- LobbyQueAdd
- LobbyQueMod
- CRMClientRelDataInq
- CRMClientRelDataMod
- CRMRmndSrch
- CRMRmndMultiInq
- CRMRmndMod

## **Rstr**

This simple element represents the level of restrictions that can exist for a named service (**Oper**).

The following are valid values.

### **NoAccess**

This element indicates that the targeted user is not permitted to access the named service (**Oper**).

### **ReadWrite**

This element indicates that the targeted user is permitted to access, read, and write to all elements within the named service (**Oper**).

### **ReadWritePart**

This element indicates that the targeted user is permitted to access, read all elements, but only write to some elements within the named service (**Oper**).

### **ReadOnly**

This element indicates that the targeted user is permitted to access and read all elements within the named service (**Oper**).

### **ReadOnlyPart**

This element indicates that the targeted user is only permitted to access and read certain

elements within the named service (**Oper**).

## CRM Customer Services

Synapsys has messaging services for the inquiry and search of customer information on service providers.

### CRM Customer Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMcustInq

The CRM customer inquiry service returns element details for a specific customer. The customer identification element **CRMcustInq** is required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The activity intention element **ActIntent** was added to support the concurrency model for modifications made to customer information.

The customer inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific customer based on the customer ID. If the customer ID is not known, the consumer must first perform a customer search to obtain the ID for the desired customer.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

### Message Flow

## CRM Customer Search Request

CRMCustSrchrq\_MType

The consumer sends the CRMCustSrchrq\_MType message containing at least one of the optional search elements: **TaxId**, **FirstName**, **LastName**, or **PhoneNum**.

## CRM Customer Search Response

CRMCustSrchrS\_MType

The service provider sends the CRMCustSrchrS\_MType message containing an echo of the request plus CRMCustSrchrArray.

## CRM Customer Inquiry Request

CRMCustInqrq\_MType

The consumer sends the CRMCustInqrq\_MType message containing the required complex element CRMClient with the required simple element **CRMClientId** for the desired customer.

## CRM Customer Inquiry Response

CRMCustInqRs\_MType

The service provider sends the CRMCustInqRs\_MType message containing an echo of the request plus CRMCustInqRec.

## Request

The third-party consumer forwards the CRMCustInq request message to the service provider.

## CRMClientId

This complex element contains the following elements.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8129	Error	<i>This element is required.</i>

## CRMClientId

This element indicates the portfolio of the client.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

## CRMClientIdType

This element indicates if the search is for an existing or potential client in Synapsys.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMCustInq` response message to the service consumer, which returns element details for a specific client for the `CRMCustInq` that was requested.

The following arrays and elements are contained within the `CRMCustInq` response applicable for Synapsys CRM Services.

## ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

## ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMCustInqRec

This complex element contains a package of data related to a customer and includes the

following arrays and elements.

### **CRMClientId**

This complex element contains the following elements.

#### **CRMClientId**

This element indicates the portfolio of the client.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **CRMClientIdType**

This element indicates if the search is for an existing or potential client in Synapsys.

#### **CustId**

This element represents the customer's portfolio.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

#### **TaxId**

This element represents the client's Social Security Number.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **CRM CustInfoRec**

This complex element contains a collection of simple elements and arrays.

#### **PersonName**

This complex element contains the following elements.

## ComName

# ComName

This element represents the customer's full name.

# FirstName

# FirstName

This element represents the customer's first name.

# SvcPrvdInfo

# SvcPrvdInfo

This element represents the service provider's information.

# Ver\_1

# Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **BirthDt**

This element represents the date of birth associated with the customer.

In a multibank environment, the **OvrrdInstRtld** attribute is supported.

## **CustProfCode**

This element represents the customer's profit information.

## **HouseholdProfCode**

This element represents the customer's household profit information.

## **CustSatfCode**

This element represents the client satisfaction level.

## CRMOffCode

This element represents the associate that is assigned to the client.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

## PhoneArray

This element returns an array of responses that contain phone numbers for the client record. It includes the `PhoneInfo` complex element for each phone record returned.

# PhoneInfo

# PhoneInfo

This complex element contains the following elements.

# PhoneNum

# PhoneNum

This element represents the client's phone number.

# PhoneType

# PhoneType

This element represents the type of phone number that is associated with the client.

Canonical values are:

- *Home*
- *Work*
- *Cell*

## CRMAddrArray

This element returns an array of responses for the customer address and includes the `CRMAddrRec` complex element for each customer returned.

# CRMAddrRec

# CRMAddrRec

This complex element contains the following elements.

## CRMAddr

## CRMAddr

This complex element contains the following elements.

## CRMAddrType

## CRMAddrType

This element represents the type of address associated with the customer.

## StreetAddr1

## StreetAddr1

This element represents the first line of the client's address.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

## StreetAddr2

## StreetAddr2

This element represents the second line of the client's address.

## City

## City

This element represents the state that the client resides in.

## StateCode

## StateCode

This element represents the state that the client resides in.

## PostalCode

## PostalCode

This element represents the ZIP code associated with the client.

## Cntry

## Cntry

This element represents the full name of the country that the client resides in.

## Ver\_1

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## StreetAddr3

## StreetAddr3

This element represents the city associated with the client.

## Ver\_2

## Ver\_2

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **UserDefInfoArray**

This complex element contains the following elements.

# UserDefInfo

## UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

## UserDefTxt

This element represents the value to be associated with the client.

# UserDefDesc

## UserDefDesc

This element represents the description of the additional information that is related to the client.

# Ver\_1

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **CRM Customer Search**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMCustSrch

The CRM customer search service returns all customers for a particular **InstRtid**, based on specified filter criteria. The request provides the following optional filters.

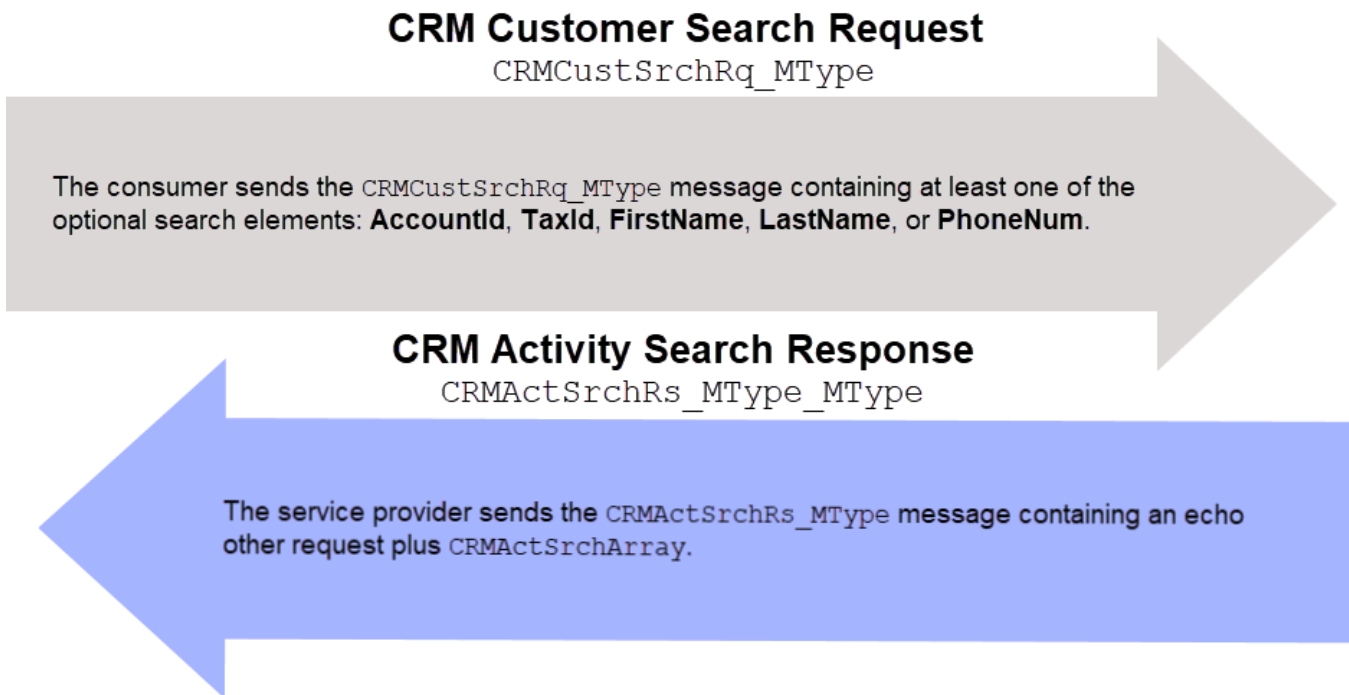
- **AccountId** (optional)
- **TaxId** (optional)
- **FirstName** (optional)
- **LastName** (optional)

- **PhoneNum** (optional)
- **CRMOffCode** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## Message Flow



## Request

The third-party consumer forwards the `CRMCustSrchr` request message to the service provider.

The following general errors or warnings may occur with the `CRMCustSrchr` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	No record(s) were found for the request received.
8069	Error	For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	AcctID is required when an AcctType has been passed.

### AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

Valid values for **AcctType** are obtained in `SvcDictInfoArray` of the Service Dictionary Search response for the **AcctId** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8091	Error	<i>Element is required for user defined fields.</i>

## FirstName (Optional)

This optional element represents a valid client first name or additional service only client account name within the Synapsys database.

This element supports the *Exact, Contains, StartsWith, and EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

## LastName (Optional)

This optional element represents a valid client last name or additional service only client account name within the Synapsys database.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

## PhoneNum (Optional)

This optional element represents a valid client home phone, work phone, cell number, or additional service only client phone number within the Synapsys database.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8085	Error	<i>SrchType must be Exact, EndsWith or Contains.</i>

## CRMOffCode (Optional)

This optional element aids in filtering customers based on who they are currently assigned to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtld** attribute is supported.

## IncXtendElemArray (Optional)

This array is used to request additional, optional information pertaining to the service event.

### IncXtendElemInfo

The `IncXtendElemInfo` complex element contains a single record indicating the additional optional information being requested.

### XtendElem

This element represents the additional, optional information being requested.

`x_CRMRelActArray` is the only supported value.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

### Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMCustSrch` response message to the service consumer, which returns a list of customers that meet the specified search criteria.

The following arrays are contained within the `CRMCustSrch` response message.

### CRMCustSrchArray

This element returns an array of responses for the customer search and includes the `CRMCustSrchRec` complex element for each customer returned.

## CRMCustSrchRec

The `CRMCustSrchRec` complex element contains a package of data related to a customer and includes the following simple elements.

### TaxId

This element represents the customer's Social Security Number or tax ID.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### CustId

This element represents the customer's portfolio.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### PersonName

This complex element contains the following elements.

## FirstName

## FirstName

This element represents the customer's first name.

## LastName

## LastName

This element represents the customer's last name.

## ComName

## ComName

This element represents the customer's full name.

## **BirthDt**

This element represents the date of birth associated with the prospect.

## **CRMRelCode**

This element represents the relcode1 of the customer that the activity belongs to.

## **CRMOffCode**

This element indicates the associate for the customer.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CRMClientId**

This complex element contains the following elements.

# CRMClientId

# CRMClientId

This element indicates the portfolio of the client.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **x\_CRMAddrArray**

This element returns an array of responses for the customer address and includes the `CRMAddrRec` complex element for each customer returned.

# CRMAddrRec

# CRMAddrRec

This complex element contains the following elements.

# CRMAddr

# CRMAddr

This complex element contains the following elements.

## StreetAddr1

## StreetAddr1

This element represents the first line of the prospect's address.

## StreetAddr2

## StreetAddr2

This element represents the second line of the prospect's address.

## City

## City

This element represents the city associated with the prospect.

## StateCode

## StateCode

This element represents the state that the prospect resides in.

## PostalCode

## PostalCode

This element represents the ZIP code associated with the prospect.

## Cntry

## Cntry

This element represents the full name of the country that the prospect resides in.

# Ver\_1

# Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

# StreetAddr3

# StreetAddr3

This element represents the third line of the prospect's address.

## **CRM Prospect Services**

Synapsys has messaging services for the addition, search, inquiry, and modification of prospect information on service providers.

## **CRM Prospect Add**

The CRM prospect add service allows the service consumer to add a prospect into the Synapsys database. The consumer must provide any required elements that are part of the `CRMProspInfoRec` complex element for the prospect.

This element allows a maximum of 40 characters.

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMProspAdd**

The user submitting the Synapsys CRM Service request is identified as the associate who created the prospect.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## **Message Flow**

## CRM Activity Add Request

CRMActAddRq\_MType

The consumer sends the `CRMActAddRq_MType` message containing the required element **CRMActType** and a unique customer or proposed identified by **CRMCustId**, **CRMRelCode**, or **TaxId** as well as any required elements that are part of the `CRMActInfoRec` complex element.

## CRM Activity Add Request

CRMActAddRs\_MType

The service provider sends the `CRMActAddRs_MType` message containing an echo of the request plus the response status **RsStat** indicating if the add was successful. If the add was successful the **CRMActId** assigned to the new activity is also returned. An unsuccessful ad request returns the errors that prevented the add.

## Request

The third-party consumer forwards the `CRMPerspAdd` request message to the service provider.

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they wish to override when sending the `CRMPerspAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMPerspAdd` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8145	Fault	<i>The officer permission AllowProspectsCreate is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8119</ElemCanocVal>
      <ElemCanocValDesc> Officer requesting does not have sufficient privileges to
        delete.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8149</ElemCanocVal>
      <ElemCanocValDesc>Your current settings for AllowProspectMerge and AllowProspectDelete
        do not allow you to merge this Prospect record.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMProspInfoRec (Required)

This complex element contains the following elements.

`CRMProspInfoRec` is a complex element that contains a collection of simple elements and

arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8145	Fault	<i>The officer permission AllowProspectsCreate is set to False.</i>

### **CustType (Required)**

This element indicates if the record is a business or personal type of prospect.

Canonical values are:

- *P* (personal)
- *B* (business)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8048	Error	<i>CustType is invalid. Must be P (Personal) or B (Business).</i>
8049	Error	<i>CustType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>P</ElemCanocVal>
      <ElemCanocValDesc>Personal</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>B</ElemCanocVal>
      <ElemCanocValDesc>Business</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## TaxId (Optional)

This element represents the Social Security Number or tax ID for the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8146	Error	<i>This prospect already exists as a customer or prospect.</i>
8147	Error	<i>The length of the TaxId provided must be 9 characters.</i>

## PersonName (Required)

This complex element contains the following elements.

### FirstName

This element represents the first name that is associated with the prospect. When **CustType** = *P*, **FirstName** is required.

#### NOTE

You need to append the first initial of the middle name to the **FirstName** element for the

| prospect web service calls.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8129	Error	<i>This element is required.</i>

### **LastName**

This element represents the last name of the prospect.

When **CustType** = *P*, this element represents the last name to be associated with the prospect.

When **CustType** = *B*, this element represents the name of the business to be associated with the prospect.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8129	Error	<i>This element is required.</i>

### **Addr (Optional)**

This complex element contains the following elements.

### StreetAddr1

This element represents the first line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### StreetAddr2

This element represents the second line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### StreetAddr3

This element represents the third line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## City

This element represents the city associated with the prospect.

This element is only available when **CountryType** = *US* or is blank.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## StateCode

This element represents the two-digit code to be associated with the prospect. The field is only available when **CountryType** = *US* or is blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CA</ElemCanocVal>
      <ElemCanocValDesc>California</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>ID</ElemCanocVal>
      <ElemCanocValDesc>Idaho</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>SD</ElemCanocVal>
      <ElemCanocValDesc>South Dakota</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### PostalCode

This element represents the ZIP code associated with the prospect.

This element is only available when **CountryType** = *US* or is blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>

### CntryType

This element represents the two-digit code associated with the country that the prospect resides in.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8159	Error	<i>CntryType must be blank or US when there are values in City, State or Zipcode. Values in City, State or Zipcode indicate a United States Address.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>AU</ElemCanocVal>
      <ElemCanocValDesc>Australia</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>CA</ElemCanocVal>
      <ElemCanocValDesc>Canada</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### BirthDt (Optional)

This element represents the date of birth associated with the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this</i>

Error Id	Category	Description
		<i>service.</i>
8128	Error	<i>The element value provided is invalid.</i>

### **EmpName (Optional)**

This element represents the employer name to be associated with the prospect.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

### **CRMOffArray (Optional)**

This array indicates the single associate to be assigned to the prospect and contains the complex element `CRMOffRec`. Only one is permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

### **CRMOffRec**

This element contains a collection of values for an associate affiliated with the event. It

contains the following simple elements.

# CRMOffCode

## CRMOffCode

This element represents the associate that is assigned to the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8041	Error	<i>CRMOffCodeText is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

### NOTE

The values returned appear in alphabetical order according to the name that is returned in **ElemCanocValDesc**.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## PhoneArray (Optional)

This array indicates the phone numbers to be associated with the prospect and contains the complex element `PhoneInfo`. Only two are permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## PhoneInfo

This complex element contains the following elements.

# PhoneNum PhoneNum

This element represents the prospect's phone number.

This element allows for a maximum of 19 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8015	Error	<i>ActIntent is required.</i>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# PhoneType

## PhoneType

This element represents the type of phone number that is associated with the prospect.

Canonical values are:

- *Home*
- *Work*
- *Cell*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Home</ElemCanocVal>
      <ElemCanocValDesc>Home</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Work</ElemCanocVal>
      <ElemCanocValDesc>Work</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Cell</ElemCanocVal>
      <ElemCanocValDesc>Cell</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EmailArray (Optional)

This array indicates the email address to be associated with the prospect and contains the complex element `EmailInfo`. Only one is permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## EmailInfo

This complex element contains the following elements.

# EmailAddr EmailAddr

This element represents the email address for the prospect.

This element allows for a maximum of 80 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## Response

The service provider (Synapsys) returns the `CRMProspAdd` response message to the service consumer, which contains the following simple elements.

### CRMProspId

This element represents the unique ID associated with the prospect that has been added.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# CRM Prospect Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMProspSrch

The CRM prospect search service returns all prospects for a particular **InstRtid** based on specified filter criteria. The request provides the following filters.

- **PersonName** (optional)
- **TaxId** (optional)
- **PhoneNum** (optional)
- **SrchAddr** (optional)
- **SrchCity** (optional)
- **State** (optional)
- **PostalCode** (optional)
- **CRMOffCode** (optional)
- **CustType** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Prospect Search Request

CRMProspSrchrq\_MType

The consumer sends the CRMProspSrchrq\_MType message containing the required element **CustType** and at least one of the optional search elements: **PersonName**, **TaxId**, **PhoneNum**, **SrchAddr**, **SrchCity**, **State**, or **PostalCode**.

## CRM Prospect Search Response

CRMProspSrchrS\_MType

The service provider sends the CRMProspSrchrS\_MType message containing an echo of the request, plus CRMProspSrchrArray.

### Request

The third-party consumer forwards the CRMProspSrchr request message to the service provider.

The element **CustType** and at least one of the following elements contained within the CRMProspSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMProspSrchr service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	No record(s) were found for the request received.
8069	Error	For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.

## PersonName (Optional)

This complex element contains the following elements.

### ComName (Optional)

This optional element represents a valid prospect first name and last name combination within the Synapsys database.

**ComName** supports the *Exact*, *StartsWith*, *EndsWith*, and *ContainsAll* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

### FirstName (Optional)

This optional element represents a valid prospect first name within the Synapsys database.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

### LastName (Optional)

This element represents the last name of the prospect.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes,

with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

### **TaxId (Optional)**

This optional element represents a valid prospect Social Security Number or tax ID within the Synapsys database.

This element supports the *Exact, Contains, StartsWith, and EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8084	Error	<i>SrchType must be Exact, StartsWith or EndsWith.</i>

### **PhoneNum (Optional)**

This element represents the prospect's phone number.

This element supports the *Exact, Contains, StartsWith, and EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8085	Error	<i>SrchType must be Exact, EndsWith or Contains.</i>

### SrchAddr (Optional)

This optional element represents a valid prospect address1 or address2 within the Synapsys database.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

### SrchCity (Optional)

This optional element represents a valid prospect city within the Synapsys database.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8083	Error	<i>SrchType must be Exact, Contains, StartsWith or EndsWith.</i>

### State (Optional)

This optional element represents a valid prospect state within the Synapsys database.

**State** currently supports only the **Exact Match** search attribute, meaning an exact match must result to satisfy the entered criteria.

## PostalCode (Optional)

This element represents the ZIP code associated with the prospect.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

## CustType (Optional)

This optional element indicates whether to search for business or personal prospect records within the Synapsys database.

Canonical values are:

- *P* (personal)
- *B* (business)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8048	Error	<i>CustType is invalid. Must be P (Personal) or B (Business).</i>

## CRMOffCode (Optional)

This optional element aids in filtering customers based on who they are currently assigned to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

In addition, the **CurUsr** element is available. This element filters customers based on the associate that has been derived from the header sent along with the `CRMCustSrch` request.

## Response

The service provider (Synapsys) returns the `CRMProspSrch` response message to the service consumer, which returns a list of prospect records that meet the specified search

criteria.

The following arrays are contained within the `CRMProspSrch` response message.

## **CRMProspSrchArray**

This element returns an array of responses for the prospect search and includes the `CRMProspSrchRec` complex element for each prospect record returned.

## **CRMProspSrchRec**

This complex element contains a package of data related to a prospect and includes the following arrays and elements.

### **CRMProspId**

This element represents the Social Security Number or tax ID or if not available, a unique ID assigned to the prospect.

### **CustType**

This element indicates if the record is a business or personal type of prospect.

Canonical values are:

- *P* (personal)
- *B* (business)

### **TaxId**

This element represents the Social Security Number or tax ID of the prospective customer.

### **PersonName**

This complex element contains the following elements.

# ComName

# ComName

This element represents the customer's full name.

# FirstName

## FirstName

This element represents the first name of the prospect.

# LastName

## LastName

This element represents the last name of the prospect.

### **Addr**

This complex element contains the following elements.

# StreetAddr1

## StreetAddr1

This element represents the first line of the prospect's address.

# StreetAddr2

## StreetAddr2

This element represents the second line of the prospect's address.

# City

## City

This element represents the city that the prospect resides in.

# StateCode

## StateCode

This element represents the state that the prospect resides in.

# PostalCode

## PostalCode

This element represents the prospect's residential postal code.

# Cntry

## Cntry

This element represents the full name of the country that the prospect resides in.

# CntryType

## CntryType

This element represents the two-digit code associated with the country that the prospect resides in.

### **PhoneArray**

This element returns an array of responses that contain phone numbers for the prospect record. It includes the `PhoneInfo` complex element for each phone record returned.

# PhoneInfo

## PhoneInfo

This complex element contains the following elements.

# PhoneNum

## PhoneNum

This element represents the prospect's phone number.

# PhoneType

# PhoneType

This element represents the type of phone number that is associated with the prospect.

Canonical values are:

- *Home*
- *Work*
- *Cell*

## CRM Prospect Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMProsplnq

The CRM prospect inquiry service returns element details for a specific prospect. The prospect identification element **CRMProspId** is required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The activity intention element **ActIntent** was added to support the concurrency model for modifications made to prospect information.

The prospect inquiry service uses a typical exchange of `MtType` messages to retrieve profile information for a specific prospect based on the prospect ID. If the prospect ID is not known, the consumer must first perform a prospect search to obtain the prospect ID for the desired prospect.

The combination of **CRMProspId** and the **InstRtid** provided in the header ensures a unique prospect within the Synapsys database.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Prospect Search Request

CRMProspSrchrq\_MType

The consumer sends the CRMProspSrchrq\_MType message containing the required element **CustType** and at least one of the optional search elements: **PersonName**, **TaxId**, **PhoneNum**, **SrchAddr**, **SrchCity**, **State**, or **PostalCode**.

## CRM Prospect Search Response

CRMProspInqrq\_MType

The service provider sends the CRMProspSrchrRs\_MType message containing an echo of the request, plus CRMProspSrchrArray.

## CRM Prospect Inquiry Request

CRMProspInqrq\_MType

The consumer sends the CRMProspInqrq\_MType message containing the required element **Prospld** for the desired prospect.

## CRM Prospect Inquiry Response

CRMProspInqRs\_MType

The service provider sends the CRMProspSrchrRs\_MType message containing an echo of the request, plus CRMProspSrchrArray.

## Request

The third-party consumer forwards the CRMProspInq request message to the service provider.

The following elements are contained within this request message and are necessary for

Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMProspInq` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### CRMProspId (Required)

This element represents a specific prospect within the Synapsys database when it is combined with the `InstRtId` that is provided in the header along with the `CRMProspInq` request message.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8044	Error	<i>CRMProspId is required.</i>
8155	Warning	<i>There are opt out codes associated with this client/prospect. View denied.</i>
8156	Warning	<i>There are opt out codes associated with this client/prospect. View permitted.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMProspInq` response message to the service consumer, which returns element details for a specific prospect for the **CRMProspId** that was requested.

The following arrays and elements are contained within the `CRMProspInq` response applicable for Synapsys CRM Services.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

### CRMProspInqRec

This complex element contains a package of data related to a prospect and includes the following arrays and elements.

## **CRMProspId**

This element represents a specific prospect within the Synapsys database.

## **CRMProspInfoRec**

This complex element contains a package of data related to a prospect and includes the following arrays, complex elements, and simple elements.

## **CustType**

This element indicates if the record is a business or personal type of prospect.

Canonical values are:

- *P* (personal)
- *B* (business)

## **TaxId**

This element represents the Social Security Number or tax ID of the prospective customer.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **PersonName**

This complex element contains the following elements.

# ComName

# ComName

This element represents the prospect's full name.

# FirstName

# FirstName

This element represents the first name of the prospect.

# LastName

# LastName

This element represents the last name of the prospect.

## **Addr**

This complex element contains the following elements.

# StreetAddr1

# StreetAddr1

This element represents the first line of the prospect's address.

# StreetAddr2

# StreetAddr2

This element represents the second line of the prospect's address.

# StreetAddr3

# StreetAddr3

This element represents the third line of the prospect's address.

# City

# City

This element represents the city that the prospect resides in.

This element is only available when **CntryType** = *US* or is blank.

# StateCode

# StateCode

This element represents the state that the prospect resides in.

This element is only available when **CntryType** = *US* or is blank.

## PostalCode

## PostalCode

This element represents the prospect's residential postal code.

This element is only available when **CntryType** = *US* or is blank.

## Cntry

## Cntry

This element represents the full name of the country that the prospect resides in.

## CntryType

## CntryType

This element represents the two-digit code associated with the country that the prospect resides in.

### **BirthDt**

This element represents the date of birth associated with the prospect.

### **EmplName**

This element represents the name of the prospect's employer.

### **CRMOffArray**

This element returns an array of responses that contain officers associated with the prospect record. It includes the `CRMOffRec` complex element for each record returned.

## CRMOffRec

# CRMOffRec

This element contains a collection of simple elements.

# CRMOffCode

# CRMOffCode

This element represents the associate that is assigned to the prospect.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

# CRMOffDesc

# CRMOffDesc

This element represents the name of the associate who is assigned to the prospect.

## **PhoneArray**

This element returns an array of responses that contain phone numbers for the prospect record. It includes the `PhoneInfo` complex element for each phone record returned.

# PhoneInfo

# PhoneInfo

This complex element contains the following elements.

# PhoneNum

# PhoneNum

This element represents the prospect's phone number.

# PhoneType

# PhoneType

This element represents the type of phone number that is associated with the prospect.

Canonical values are:

- *Home*
- *Work*
- *Cell*

## **EmailArray**

This array indicates the email address to be associated with the prospect and contains the complex element `EmailInfo`. Only one is permitted.

# EmailInfo

## EmailInfo

This complex element contains the following elements.

# EmailAddr

## EmailAddr

This element represents the email address for the prospect.

## **CRMProspPfArray**

This element returns an array containing a single response of the configured field to display on a prospect profile view and includes the `UserDefInfo` complex element for the record that is returned. There is never more than one record in this array.

# UserDefInfo

## UserDefInfo

This complex element contains the following elements.

# UserDefDesc

## UserDefDesc

This element represents the label that should appear on a prospect profile view.

# UserDefTxt

## UserDefTxt

This element represents the value that should appear on a prospect profile view.

### **CRMOptInfoArray**

This element returns an array of responses that contain opt out information for the prospect record and includes the `CRMOptInfo` complex element for each opt-out record returned.

# CRMOptInfo

## CRMOptInfo

The `CRMOptInfo` complex element contains the following simple elements.

# CRMOptCode

## CRMOptCode

This element represents the code of the opt-out record associated with the prospect.

# CRMOptDesc

## CRMOptDesc

This element represents the description of the opt-out record associated with the prospect.

### **CRMProspId**

This element represents a specific prospect within the Synapsys database.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

## **CRM Prospect Modify**

The CRM prospect modify service allows the service consumer to modify certain elements for a specific prospect or merge a prospect with another prospect or client record. The

**CRMProspId** and **ActIntentKey** elements are required on the modification request.

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMProspMod**

The prospect modification service uses a typical exchange of *Mtype* messages to allow updates to the information for a specific prospect, based on the **CRMProspId**. A prospect inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## **Message Flow**

## CRM Prospect Inquiry Request

CRMProspInqRq\_MType

The consumer sends the CRMProspInqRq\_MType message containing the required elements **CRMProspId** and **CRMEventType** for the desired prospect.

## CRM Prospect Inquiry Response

CRMProspInqRs\_MType

The service provider sends the CRMProspInqRs\_MType message containing an echo of the request, plus CRMProspInfoRec.

## CRM Prospect Mod Request

CRMProspModRq\_MType

The consumer sends the CRMProspModRq\_MType message containing the required **CRMProspId** and **ActIntentKey** elements. Additionally, both the CRMProspInfoRec complex element or **DIt** or **MrgTgt** element must be included for the desired prospect.

The consumer sends the CRMProspModRq\_MType message containing the required **CRMProspId** and **ActIntentKey** elements. There are three scenarios that determine which additional elements are required: *modification of prospect elements* (CRMProspInfoRec is required), *deletion of prospect record* (**DIt** is required), and *merge prospect with another client or prospect* (**MrgTgt** and **DIt** are required).

## CRM Prospect Mod Response

CRMProspModRs\_MType

The service provider sends the CRMProspModRs\_MType message containing the response status **RsStat** indicating if the mod was successful. An unsuccessful mod request also returns the errors that prevented the mod.

## Request

The third-party consumer forwards the CRMProspMod request message to the service

provider.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8219	Error	<i>The officer does not have sufficient privileges to edit.</i>

### **ErrOvrRdInfoArray (Optional)**

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they wish to override when sending the `CRMProspectMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### **ErrCode**

This element represents a valid error code that pertains to `CRMProspectMod` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8149	Fault	<i>Your current settings for AllowProspectMerge and AllowProspectDelete do not allow you to merge this Prospect record.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	CRMEventType	Description
8007	<i>Svc</i>	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8119</ElemCanocVal>
      <ElemCanocValDesc>Officer requesting does not have sufficient privileges to delete.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8149</ElemCanocVal>
      <ElemCanocValDesc>Your current settings for AllowProspectMerge and AllowProspectDelete do not allow you to merge this Prospect record.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMProspId (Required)

This element represents a specific prospect within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8150	Error	<i>The requested Prospect is not valid in the Synapsys database.</i>

### ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

### **Dlt (Required in Certain Scenarios)**

This element represents the desire for deletion of the specified prospect.

Canonical values are:

- *True*
- *False* (default)

**Dlt** is required in two scenarios: deletion of prospect record (**Dlt** is required), merge prospect with another client or prospect (**MrgTgt** and **Dlt** are required).

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8148	Error	<i>Dlt must be = True when merging Prospect records.</i>

### **CRMProspInfoRec (Required in Certain Scenarios)**

This complex element contains a collection of simple elements and arrays.

CRMProspInfoRec is only required when modifying elements on a prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

### TaxId (Optional)

This element represents the Social Security Number or tax ID for the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8147	Error	<i>The length of the TaxId provided must be 9 characters.</i>

### PersonName

This complex element contains the following elements.

#### FirstName

This element represents the first name of the prospect. When **CustType** = *B*, **FirstName** is ignored.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8065	Error	<i>JHANull is not supported for element.</i>

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### **LastName**

When **CustType** = *P*, **LastName** represents the last name to be associated with the prospect. When **CustType** = *B*, **LastName** represents the name of the business to be associated with the prospect.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

### **Addr (Optional)**

This complex element contains the following elements.

#### **StreetAddr1**

This element represents the first line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### StreetAddr2

This element represents the second line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### StreetAddr3

This element represents the third line of the prospect's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### City

This element represents the city associated with the prospect.

This element is only available when **CountryType** = *US* or is blank.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Warning	<i>The max size has been exceeded for this</i>

Error Id	Category	Description
		<code>element.</code>

### StateCode

This element represents the two-digit code to be associated with the prospect. The field is only available when **CountryType** = *US* or is blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CA</ElemCanocVal>
      <ElemCanocValDesc>California</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>ID</ElemCanocVal>
      <ElemCanocValDesc>Idaho</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>SD</ElemCanocVal>
      <ElemCanocValDesc>South Dakota</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## PostalCode

This element represents the ZIP code associated with the prospect.

This element is only available when **CountryType** = *US* or is blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>

## CntryType

This element represents the two-digit code associated with the country that the prospect resides in.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8159	Error	<i>CntryType must be blank or US when there are values in City, State or Zipcode. Values in City, State or Zipcode indicate a United States Address.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>AU</ElemCanocVal>
      <ElemCanocValDesc>Australia</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>CA</ElemCanocVal>
      <ElemCanocValDesc>Canada</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

**BirthDt (Optional)**

This element represents the date of birth associated with the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>

**EmpName (Optional)**

This element represents the employer name to be associated with the prospect.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this</i>

Error Id	Category	Description
		<i>element.</i>

### CRMOffArray (Optional)

This array indicates the single associate to be assigned to the prospect and contains the complex element `CRMOffRec`.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

### CRMOffRec

This element contains a collection of simple elements.

## CRMOffCode

## CRMOffCode

This element represents the associate that is assigned to the prospect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

**NOTE**

The values returned are in alphabetical order according to the name that is returned in **ElemCanocValDesc**.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

**PhoneArray (Optional)**

This array indicates the phone numbers to be associated with the prospect and contains the complex element `PhoneInfo`. Only two are permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

**PhoneInfo**

This complex element contains the following elements.

# PhoneNum

# PhoneNum

This element represents the prospect's phone number.

This element allows for a maximum of 19 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# PhoneType PhoneType

This element represents the type of phone number that is associated with the prospect.

Canonical values are:

- *Home*
- *Work*
- *Cell*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Home</ElemCanocVal>
      <ElemCanocValDesc>Home</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Work</ElemCanocVal>
      <ElemCanocValDesc>Work</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Cell</ElemCanocVal>
      <ElemCanocValDesc>Cell</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EmailArray (Optional)

This array indicates the email address to be associated with the prospect and contains the complex element `EmailInfo`. Only one is permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

### EmailInfo

This complex element contains the following elements.

# EmailAddr EmailAddr

This element represents the email address for the prospect.

This element allows for a maximum of 80 characters.

## MrgTgt (Required in Certain Scenarios)

MrgTgt contains a collection of simple elements that indicate whether CRMProspId should be merged with another prospect or client.

When merging with an existing prospect, only CRMTgtProspId must be provided. When merging with an existing client, the combination of **TaxId**, **CustId**, and **CRMRelCode** must identify a unique client in the Synapsys database.

MrgTgt is only required when merging a prospect with another client or prospect. When a merge is being done, **DIt** is also required.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	The elements provided did not result in a valid or unique client in the Synapsys database.
8149	Fault	Your current settings for AllowProspectMerge and AllowProspectDelete do not allow you to merge this Prospect record.
8151	Error	Both a prospect and client were provided, only 1 allowed.
8153	Error	A prospect cannot be merged to the same prospect.

## CRMTgtProspId

This element represents the prospect that **CRMProspId** should be merged into.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8150	Error	The requested Prospect is not valid in the Synapsys database.

Error Id	Category	Description
8153	Error	<i>A prospect cannot be merged to the same prospect.</i>

### TaxId

This element represents a valid Social Security Number or tax ID of a client or additional service only client within the Synapsys database that **CRMProspId** is merged into.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

### CustId

This optional element represents a valid client or additional service only client portfolio within the Synapsys database. **CRMProspId** should be merged into this element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

### CRMRelcode

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database. **CRMProspId** is merged into this element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.

## Response

The service provider (Synapsys) returns the `CRMProspectMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Reminder Services (Ticklers)

Synapsys has reminder services for the addition, modification, inquiry, and search of ticklers for events and activities.

### CRM Reminder Modify (Ticklers)

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMRmndMod

The CRM Reminder Modify service allows the service consumer to modify specific elements for configured ticklers.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

### Message Flow

## CRM Reminder Inquiry Request **CRMRmndMultiInqRq\_Mtype**

The Consumer sends the **CRMRmndMultiInqRq\_MType** message containing the required elements *CRMItemId* and *CRMItemType* for the desired tickler or the associated event/activity.

## CRM Reminder Inquiry Response **CRMRmndMultiInqRs\_Mtype**

The Service Provider sends the **CRMRmndMultiInqRs\_MType** message containing an echo of the request, plus *CRMRmndMultiInqRecArray*.

## CRM Reminder Mod Request **CRMRmndModRq\_Mtype**

The Consumer sends the **CRMRmndModRq\_MType** message containing the required elements *CRMItemId*, *CRMItemType* and *ActIntentKey* for the desired tickler or the associated event/activity.

## CRM Reminder Mod Response **CRMRmndModRs\_Mtype**

The Service Provider sends the **CRMRmndModRs\_MType** message containing the response status *RsStat* indicating if the mod was successful. An unsuccessful mod request also returns the errors that prevented the mod.

## Request

The third-party consumer forwards the **CRMRmndMod** request message to the service provider.

The following errors, warnings, or faults may occur with the CRMrmndMod service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8120	Fault	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8123	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8167	Fault	<i>The officer does not have sufficient privileges to edit.</i>

Error Id	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>
8218	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8219	Error	<i>The officer does not have sufficient privileges to edit.</i>

### **ErrOvrRdInfoArray (Optional)**

The customer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMRmndMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### **ErrCode**

This element represents a valid error code that pertains to the `CRMRmndMod` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>

Error Id	Category	Description
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8120	Fault	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8123	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8167	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8218	Fault	<i>The officer does not have sufficient privileges to edit.</i>

### **CRMItemid (Required)**

This element represents a specific reminder item or associated event/activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8217	Error	<i>The event or activity that was provided has a terminating status. Ticklers cannot be added.</i>

### **CRMItemType (Required)**

This element indicates the type of event.

The following are valid canonical values:

- **Rmnd**
- **CustCon**
- **Incen**
- **Sale**
- **Svc**
- **Cmpgn**
- **Note**
- **Meet**
- **Msg**
- **Phone**

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8129	Error	<i>This element is required.</i>
8130	Error	<i>The value provided for this element is not supported.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Rmnd</ElemCanocVal>
      <ElemCanocValDesc>Tickler</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Cust Con</ElemCanocVal>
      <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incn</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Cmpgn</ElemCanocVal>
      <ElemCanocValDesc>Campaign Activity</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Msg</ElemCanocVal>
      <ElemCanocValDesc>Mailing Activity</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Meet</ElemCanocVal>
      <ElemCanocValDesc>Meeting Activity</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Note</ElemCanocVal>
      <ElemCanocValDesc>Note Activity</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Phone</ElemCanocVal>
      <ElemCanocValDesc>Phone Log Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

### **CRMRmndModInfoArray (Required)**

This array is a collection of additional information that is associated with the tickler and contains the complex **CRMRmndInfoRec** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8211	Error	<i>The record count for this array is invalid. There must be at least 1 record. Multiple records are allowed only when CRMRmndType = OnBoard.</i>

### **CRMRmndInfoRec**

This complex element contains a package of data related to a tickler and includes the following simple elements.

#### **RmndType (Required)**

This element indicates the type of tickler.

Valid canonical values include the following:

- **Indv**
- **Recur**
- **Onboard**

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Fault	The officer does not have sufficient privileges to edit.
8129	Error	This element is required.
8130	Error	The value provided for this element is not supported.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information when **ElementCanocVal** = *Onboard*.
- When **CanocValDetail** = *AssignOffCode*, **CanocValTxt** represents the associate code to be passed.
- When **CanocValDetail** = *AssignOffCodeDesc*, **CanocValText** represents name of the associate.
- When **CanocValDetail** = *RmndDate*, **CanocValTxt** contains the date of the onboarding tiered tickler.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Indv</ElemCanocVal>
      <ElemCanocValDesc>Individual</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Recur</ElemCanocVal>
      <ElemCanocValDesc>Recurring</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Onboard</ElemCanocVal>
      <ElemCanocValDesc>Onboarding</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AssignDffCode</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AssignDffCodeDesc</CanocValDetail>
          <CanocValTxt>Trudy Z ██████</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RmndDate</CanocValDetail>
          <CanocValTxt>07/14/2022</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Onboard</ElemCanocVal>
      <ElemCanocValDesc>Onboarding</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AssignDffCode</CanocValDetail>
          <CanocValTxt>CMR</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AssignDffCodeDesc</CanocValDetail>
          <CanocValTxt>Chad R ██████</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RmndDate</CanocValDetail>
          <CanocValTxt>08/14/2022</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Onboard</ElemCanocVal>
      <ElemCanocValDesc>Onboarding</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AssignDffCode</CanocValDetail>
          <CanocValTxt>ARM</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AssignDffCodeDesc</CanocValDetail>
          <CanocValTxt>Aaron M ██████</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RmndDate</CanocValDetail>
          <CanocValTxt>09/14/2022</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### RmndDt (Optional)

This element represents the date that the reminder is set to occur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8218	Fault	<i>The officer does not have sufficient privileges to edit.</i>

### AssignOffCode (Optional)

This element represents the code of the associate that is assigned to the tickler.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
- When **CanocValDetail** = `OvrrdInstRtId`, **CanocValTxt** represents the institution routing number for the bank of the associate.

```

SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>TMZ</ElemCanocVal>
    <ElemCanocValDesc>Trudy Z ████████/ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>OvrrdInstrtId</CanocValDetail>
        <CanocValTxt>1██████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>SAT</ElemCanocVal>
    <ElemCanocValDesc>Sally T. ████████</ElemCanocValDesc>
  </ElemCanocRec>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>OvrrdInstrtId</CanocValDetail>
      <CanocValTxt>1██████</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

**RecurInfoRec (Optional)**

This complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8213	Error	<i>The RecurInfoRec is required when CRMRmndType = Recur and can only have one of the following: DlyRecurInfoRec, WeeklyRecurInfoRec or MthlyRecurInfoRec.</i>

**DlyRecurInfoRec (Optional)**

**DlyRecurInfoRec (Optional)**

This complex element contains a collection of simple elements when a reminder occurs daily.

**RecurRng (Optional)**

# RecurRng (Optional)

This element contains the following simple elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8210	Error	<i>Either OccurCnt or EndDate must be provided, but not both.</i>

# StartDt (Optional)

# StartDt (Optional)

This optional element designates the start date for the ticklers.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# OccurCnt (Optional)

# OccurCnt (Optional)

This element represents the length of time set for a recurring reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## EndDt (Optional)

## EndDt (Optional)

This element represents the date that the reminder is set to end.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## DlyRecurPatn (Optional)

## DlyRecurPatn (Optional)

This element represents the pattern of daily recurrence set for a reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8212	Error	Either DayCnt or EvryWeekDayType must be provided, but not both.

## DayCnt (Optional)

## DayCnt (Optional)

This element sets the number of days for a reminder to reoccur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## EvryWeekDayType (Optional) EvryWeekDayType (Optional)

This element designates a reminder to reoccur every weekday.

Valid canonical values include the following:

- **True**
- **False**

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
    . . .
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

# WeeklyRecurInfoRec (Optional)

## WeeklyRecurInfoRec (Optional)

This complex element contains a collection of simple elements when a reminder occurs weekly.

# RecurRng (Optional)

## RecurRng (Optional)

This element contains the following simple elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8210	Error	<i>Either OccurCnt or EndDate must be provided, but not both.</i>

# StartDt (Optional)

## StartDt (Optional)

This optional element designates the start date for the ticklers.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# OccurCnt (Optional)

## OccurCnt (Optional)

This element represents the length of time set for a recurring reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

# EndDt (Optional)

## EndDt (Optional)

This element represents the date that the reminder is set to end.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

# WeeklyRecurPatn (Optional)

## WeeklyRecurPatn (Optional)

This element represents the pattern of weekly recurrence set for a reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

# WeekCnt (Optional)

## WeekCnt (Optional)

This element sets the number of weeks for a reminder to reoccur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# RecurDayArray (Optional)

## RecurDayArray (Optional)

This array contains additional information associated with the tickler and contains the complex **RecurDayInfoRec** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8214	Error	<i>There must be records in RecurDayArray.</i>

# RecurDayInfoRec (Optional)

## RecurDayInfoRec (Optional)

This complex element contains a package of data related to a tickler and includes the following simple element.

# DayofWeek (Optional)

# DayofWeek (Optional)

This element indicates the day of the week that the reminder is set to occur.

Valid canonical values include the following:

- **Sun**
- **Mon**
- **Tues**
- **Wed**
- **Thur**
- **Fri**
- **Sat**

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Sun</ElemCanocVal>
      <ElemCanocValDesc>Sunday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Mon</ElemCanocVal>
      <ElemCanocValDesc>Monday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Tues</ElemCanocVal>
      <ElemCanocValDesc>Tuesday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Wed</ElemCanocVal>
      <ElemCanocValDesc>Wednesday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Thur</ElemCanocVal>
      <ElemCanocValDesc>Thursday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fri</ElemCanocVal>
      <ElemCanocValDesc>Friday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sat</ElemCanocVal>
      <ElemCanocValDesc>Saturday</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

# MthlyRecurInfoRec (Optional)

# MthlyRecurInfoRec (Optional)

This complex element contains a collection of simple elements when a reminder occurs monthly.

# RecurRng (Optional)

# RecurRng (Optional)

This element contains the following simple elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

Error Id	Category	Description
8210	Error	<i>Either OccurCnt or EndDate must be provided, but not both.</i>

## StartDt (Optional)

## StartDt (Optional)

This optional element designates the start date for the ticklers.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## OccurCnt (Optional)

## OccurCnt (Optional)

This element represents the length of time set for a recurring reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## EndDt (Optional)

## EndDt (Optional)

This element represents the date that the reminder is set to end.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## MthlyRecurPatn (Optional)

## MthlyRecurPatn (Optional)

This element represents the pattern of monthly recurrence set for a reminder.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>
8215	Error	<i>Either DayOfMonthRecurRec or DayOfWeekRecur must be provided, but not both.</i>

## DayofMonthRecurRec (Optional)

## DayofMonthRecurRec (Optional)

This complex element contains a package of data related to a tickler and includes the following simple element.

## DayCnt (Optional)

## DayCnt (Optional)

This element sets the number of days for a reminder to reoccur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## MonthCnt (Optional)

## MonthCnt (Optional)

This element sets the number of months for a reminder to reoccur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## DayofWeekRecurRec (Optional)

## DayofWeekRecurRec (Optional)

This complex element contains a package of data related to a tickler and includes the following simple element.

## DayofWeekOccur (Optional)

## DayofWeekOccur (Optional)

This element sets the week that the reminder is set to occur.

Valid canonical values include the following:

- **First**
- **Secd**
- **Third**

- **Fourth**
- **Last**

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>First</ElemCanocVal>
      <ElemCanocValDesc>First</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Secd</ElemCanocVal>
      <ElemCanocValDesc>Second</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Third</ElemCanocVal>
      <ElemCanocValDesc>Third</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fourth</ElemCanocVal>
      <ElemCanocValDesc>Fourth</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Last</ElemCanocVal>
      <ElemCanocValDesc>Last</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

# DayofWeek (Optional)

# DayofWeek (Optional)

This element sets the day of week for a reminder to reoccur.

Valid canonical values include the following:

- **Sun**
- **Mon**
- **Tues**
- **Wed**
- **Thur**
- **Fri**
- **Sat**

The following errors, warnings, or faults may occur with this element.

<b>Error Id</b>	<b>Category</b>	<b>Description</b>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Sun</ElemCanocVal>
      <ElemCanocValDesc>Sunday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Mon</ElemCanocVal>
      <ElemCanocValDesc>Monday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Tues</ElemCanocVal>
      <ElemCanocValDesc>Tuesday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Wed</ElemCanocVal>
      <ElemCanocValDesc>Wednesday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Thur</ElemCanocVal>
      <ElemCanocValDesc>Thursday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fri</ElemCanocVal>
      <ElemCanocValDesc>Friday</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sat</ElemCanocVal>
      <ElemCanocValDesc>Saturday</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

# MonthNum (Optional)

# MonthNum (Optional)

This element sets the number of months for a reminder to reoccur.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

# Dlt (Optional)

# Dlt (Optional)

This element deletes the tickler.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8216	Error	<i>True is the only supported value for this service. Any existing ticklers are always removed when this service is called. When CRMRmndModInfoArray is provided, ticklers will be created.</i>

## Response

The service provider (Synapsys) returns the `CRMRmndMod` response message to the service consumer, which allows consumers to modify reminder records.

## RsStat

This element specifies the status of the modification request.

Valid canonical values are the following:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  *
  *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>success</ElemCanocVal>
      <ElemCanocValDesc>success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>fail</ElemCanocVal>
      <ElemCanocValDesc>fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  *
  *
</SvcDictInfoRec>
```

# CRM Reminder Inquiry (Ticklers)

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMRmndInq

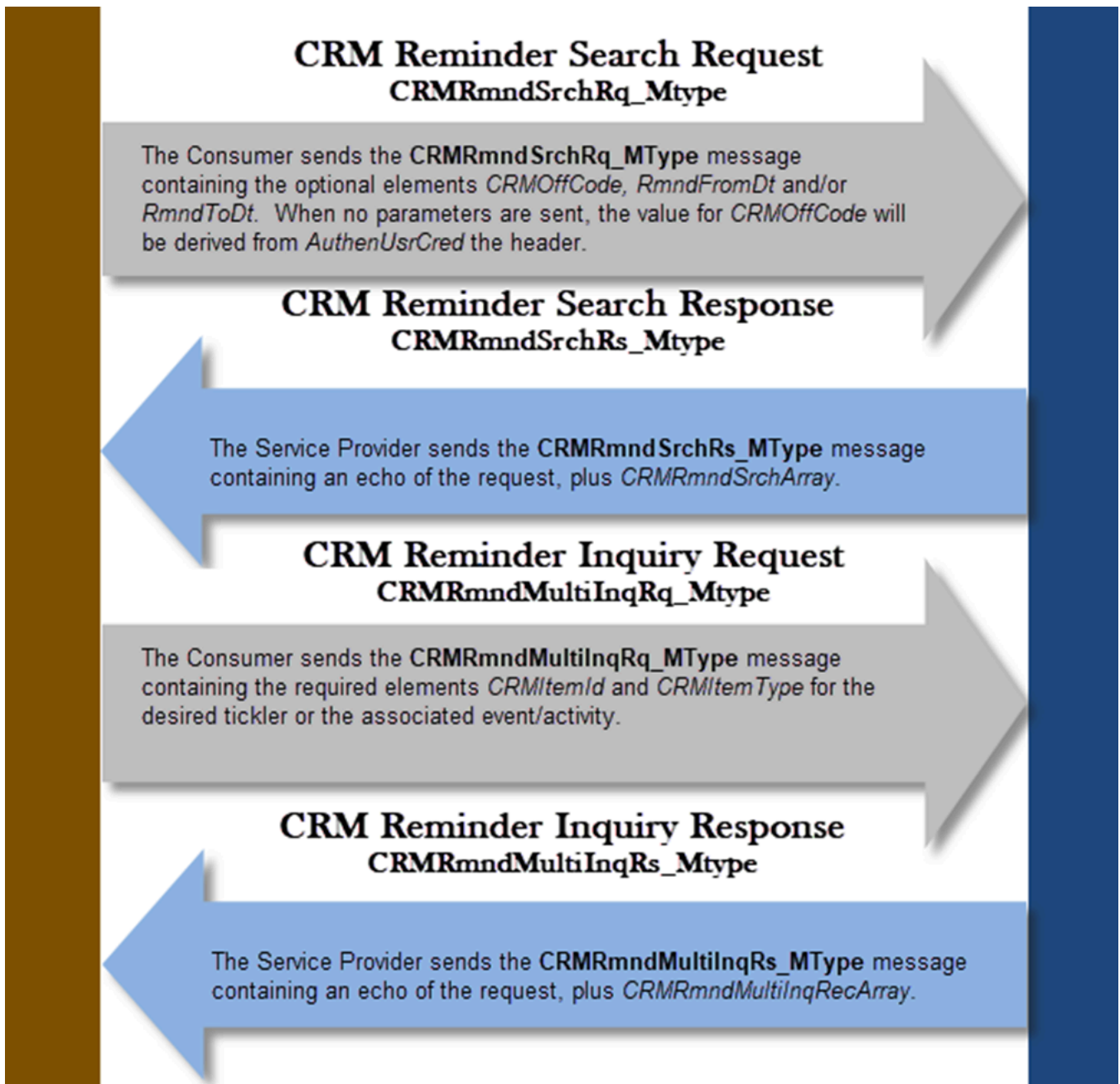
The CRM Reminder Inquiry service returns element details for a specific tickler. The reminder identification elements **CRMRmndId** and **CRMItemType** are required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The activity intention element **ActIntent** was added to support the concurrency model for modifications made to reminder information.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The `Rstr` attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

## Message Flow



## Request

The third-party consumer forwards the *CRMRmndMultiInq* request message to the service provider.

## CRMItemId (Required)

This element represents a specific reminder item or the associated event/activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8129	Error	<i>This element is required.</i>

## CRMItemType (Required)

This element represents a specific type of reminder item within the Synapsys database.

Valid canonical values for this element include the following:

- **Svc** - Synapsys Service Event
- **Sale** - Synapsys Sales Event
- **CustCon** - Synapsys Contact Event
- **Incen** - Synapsys Incentive Event
- **Note** - Synapsys Note Activity
- **Cmpgn** - Synapsys Campaign Activity
- **Meet** - Synapsys Meeting Activity
- **Msg** - Synapsys Mailing Activity
- **Phone** - Synapsys Phone Log Activity
- **Rmnd** - Synapsys Tickler

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Fault	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

Error Id	Category	Description
8130	Error	<i>The value provided for this element is not supported.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Valid canonical values include the following:

- **ReadOnly** (Default) - Indicates a view intent only for the data set included in the inquiry response.
- **Upd** - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- **Dlt** - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMRmndMultiInq` response message to the service consumer, which returns element details for a specific tickler based on the `CRMRmndMultiInq` that was requested.

The following arrays and elements are contained within the `CRMRmndMultiInq` response applicable for Synapsys CRM Services.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## **CRMRmndMultiInqRecArray**

This element is an array of inquiry reminder records.

## **CRMRmndMultiInqRec**

This element is a complex element that contains the following elements.

## **CRMRmndInfoRec**

This complex element contains the following simple elements.

## RmndType

## RmndType

This element indicates the type of tickler.

## RmndDt

## RmndDt

This element represents the date that the reminder is to occur.

## CRMItemId

## CRMItemId

This element represents a specific event or activity that the reminder item is associated with in the Synapsys database.

## CRMItemType

## CRMItemType

This element represents the type of event or activity that the reminder item is associated with in the Synapsys database.

## ActIntent

# ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

## ActIntentKey

## ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMRmndMultiInqRecArray

## CRMRmndMultiInqRecArray

This element is an array of inquiry reminder records.

## CRMRmndMultiInqRec

## CRMRmndMultiInqRec

This element is a complex element that contains the following elements.

## CRMRmndInfoRec

## CRMRmndInfoRec

This complex element contains the following simple elements.

## RmndType

## RmndType

This element indicates the type of tickler.

## RmndDt

## RmndDt

This element represents the date that the reminder is to occur.

## AssignOffCode AssignOffCode

This element represents the code of the associate that is assigned to the tickler.

## RecurInfoRec RecurInfoRec

This complex element contains a collection of simple elements and arrays.

## DlyRecurInfoRec DlyRecurInfoRec

This complex element contains a collection of simple elements when a reminder occurs daily.

## RecurRng RecurRng

This element contains the following simple elements.

## StartDt StartDt

This element designates the start date for the ticklers.

## OccurCnt OccurCnt

This element represents the number of times the reminder will occur.

## EndDt

## EndDt

This element represents the date that the reminder is set to end.

## DlyRecurPatn

## DlyRecurPatn

This element represents the pattern of daily recurrence set for a reminder.

## DayCnt

## DayCnt

This element sets the number of days for a reminder to reoccur.

## EvryWeekDayType

## EvryWeekDayType

This element designates a reminder to reoccur every weekday.

Valid canonical values include the following:

- **True**
- **False**

## WeeklyRecurInfoRec

## WeeklyRecurInfoRec

This complex element contains a collection of simple elements when a reminder occurs weekly.

## RecurRng

# RecurRng

This element contains the following simple elements.

## StartDt

## StartDt

This element designates the start date for the ticklers.

## OccurCnt

## OccurCnt

This element represents the number of times the reminder will occur.

## EndDt

## EndDt

This element represents the date that the reminder is set to end.

## WeeklyRecurPatn

## WeeklyRecurPatn

This element represents the pattern of weekly recurrence set for a reminder.

## WeekCnt

## WeekCnt

This element sets the number of weeks for a reminder to reoccur.

## RecurDayArray

## RecurDayArray

This array contains additional information associated with the tickler and contains the complex **RecurDayInfoRec** element.

# RecurDayInfoRec

## RecurDayInfoRec

This complex element contains a collection of simple elements and arrays.

# DayofWeek

## DayofWeek

This element sets the day of the week for a reminder to reoccur.

Valid canonical values include the following:

- **Sun**
- **Mon**
- **Tues**
- **Wed**
- **Thur**
- **Fri**
- **Sat**

# MthlyRecurInfoRec

## MthlyRecurInfoRec

This complex element contains a collection of simple elements when a reminder occurs monthly.

# RecurRng

## RecurRng

This element contains the following simple elements.

# StartDt

## StartDt

This element designates the start date for the ticklers.

# OccurCnt

## OccurCnt

This element represents the number of times the reminder will occur.

# EndDt

## EndDt

This element represents the date that the reminder is set to end.

# MthlyRecurPatn

## MthlyRecurPatn

This element represents the pattern of monthly recurrence set for a reminder.

# DayofMonthRecurRec

## DayofMonthRecurRec

This complex element contains a collection of simple elements when a reminder occurs monthly.

# DayCnt

## DayCnt

This element represents the pattern of daily recurrence set for a reminder.

# MonthCnt

## MonthCnt

This element sets the number of months for a reminder to reoccur.

# DayofWeekRecurRec

# DayofWeekRecurRec

This complex element contains a package of data related to a tickler and includes the following simple element.

## DayofWeekOccur

## DayofWeekOccur

This element sets the week that the reminder is set to occur.

Valid canonical values include the following:

- **First**
- **Secd**
- **Third**
- **Fourth**
- **Last**

## DayofWeek

## DayofWeek

This element sets the day of the week for a reminder to reoccur.

Valid canonical values include the following:

- **Sun**
- **Mon**
- **Tues**
- **Wed**
- **Thur**
- **Fri**
- **Sat**

## MonthNum

## MonthNum

This element sets the number of months for a reminder to reoccur.

# AssignOffDesc

## AssignOffDesc

This element represents the name of the associate that is assigned to the reminder.

# CrtOffCode

## CrtOffCode

This element represents the code assigned to the CRM associate.

# RmndCrtTimeDt

## RmndCrtTimeDt

This element represents the time and date that a reminder was created.

# RmndSubj

## RmndSubj

This element represents the subject of the reminder.

# RmndDetlArray

## RmndDetlArray

This array contains the detail section of the reminder and contains the complex **RmkInfo** element.

# RmkInfo

## RmkInfo

The element contains a collection of detail values for the reminder. It contains the following simple element.

# Rmk

# Rmk

This element provides details about the tickler.

# CrtOffDesc

# CrtOffDesc

This element represents the description of the code assigned to the CRM associate.

## CRM Reminder Search (Ticklers)

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMRmndSrch**

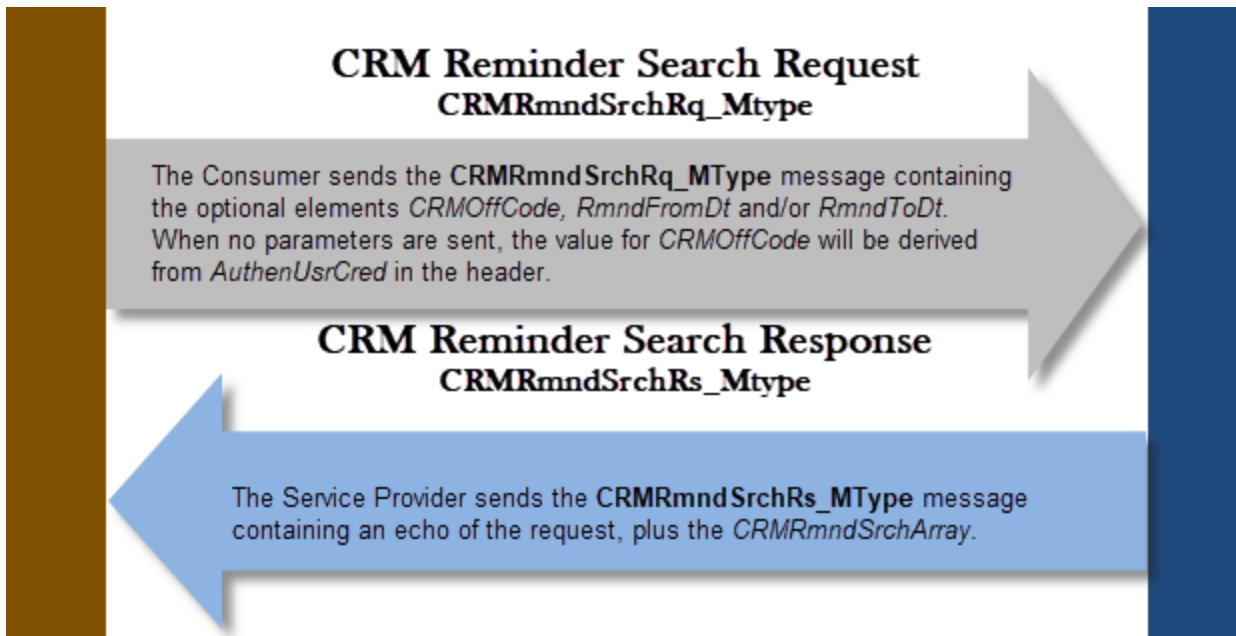
The CRM reminder search service returns all ticklers for a particular **InstRtId** based on specified filter criteria. The request provides the following filters.

- **CRMOffCode** (optional)
- **RmndFromDt** (optional)
- **RmndToDt** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

## Message Flow



## Request

The third-party consumer forwards the *CRMRmndSrch* request message to the service provider.

The following general errors or warnings may occur with the *CRMCustSrch* service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>

### CRMOffCode (Optional)

This element represents the code of the associate that is affiliated with the tickler.

### RmndFromDt (Optional)

This element represents the date that designates the starting point for date selections.

## **RmndToDt (Optional)**

This element represents the date that designates the ending point for date selections.

## **Response**

The service provider (Synapsys) returns the `CRMRmndSrch` response message to the service consumer, which returns a list of ticklers that meet the specified search criteria.

The following arrays are contained within the `CRMRmndSrch` response message.

## **CRMRmndSrchArray**

This element returns an array of responses for the reminder search and includes the `CRMRmndSrchRec` complex element for each tickler returned.

## **CRMRmndSrchRec**

The `CRMRmndSrchRec` complex element contains a package of data related to a tickler and includes the following simple elements.

## **CRMItemId**

This element represents a specific reminder item within the Synapsys database.

## **CRMItemType**

This element represents the item type within the Synapsys database. In this case, `Rmnd` indicates that the item is a tickler.

## **RmndRecv**

This element signifies whether the tickler has been read by the associate it is assigned to.

Canonical values are:

- **True**
- **False**

**RmndDt**

This element represents the date the reminder is to occur.

**RmndSubj**

This element represents the subject of the reminder.

**CRMClientId**

This complex element contains the following elements.

**CRMClientId**

This element indicates the portfolio of the client.

**CRMClientIdType**

This element indicates whether the tickler is for an existing or potential client in Synapsys.

**PersonName**

This complex element contains the following elements.

**ComName**

This element represents the client's full name.

## CRM Client Relationship Data Services

Synapsys has messaging services for the inquiry of client relationship information on service providers.

### CRM Client Relationship Data Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMClientRelDataInq

The CRM client relationship data inquiry service returns element details for a specific client

relationship. The customer identification element **CRMCustInq** is required on the request.

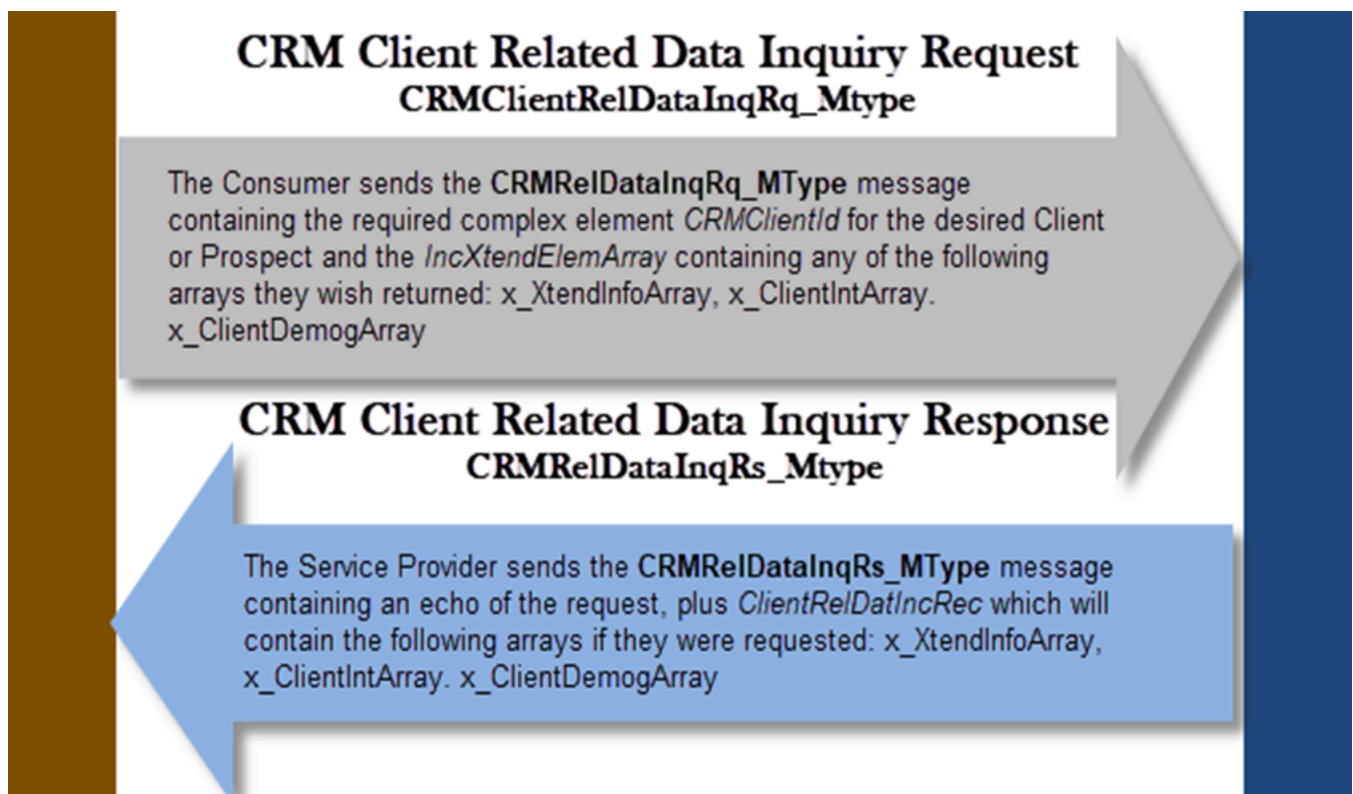
The design of the inquiry was created in a manner that facilitates addition and modification requests. The activity intention element **ActIntent** was added to support the concurrency model for modifications made to client relationship information.

The customer inquiry service uses a typical exchange of `MType` messages to retrieve profile information for a specific client relationship based on the client relationship ID. If the client relationship ID is not known, the consumer must first perform a client relationship search to obtain the ID for the desired client relationship.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

## Message Flow



## Request

The third-party consumer forwards the `CRMClientRelDataInq` request message to the service provider.

The following general errors or warnings may occur with the `CRMClientRelDataInq` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### CRMClientId (Required)

For clients or additional service only clients, when the core provider is not Symitar, this element represents a portfolio. When the core provider is Symitar only, it represents the MBRNumber. For prospects, this element represents a SSN.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8129	Error	<i>This element is required.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>
8193	Error	<i>The OvrRdInstRtId value that was provided is not valid.</i>

## CRMClientIdType (Optional)

This element indicates if the search is for an existing or potential client in Synapsys.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## XtendElem (Optional)

This element represents the additional, optional information being requested. Valid options are x\_XtendInfoArray, x\_ClientIntArray, and x\_ClientDemogrArray.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the CRMClientRelDataInq response message to the service consumer which contains the following simple elements.

## **x\_XtendInfoArray**

This array is a collection of additional information that is associated with the service and contains the complex **XtendElem** element.

## **XtendInfo**

This complex element contains a collection of simple elements and arrays.

## **XtendInfoCatDesc**

This element represents the category to which extended information elements are assigned.

## **XtendInfoDetailArray**

This array is a collection of additional detailed information that is associated with the service.

# XtendInfoDetail

# XtendInfoDetail

This complex element contains a collection of simple elements and arrays.

# ClientInfoReqName

# ClientInfoReqName

This element represents the name of the extended information element.

# ClientInfoReqCode

# ClientInfoReqCode

This element represents the unique identifier for an extended information element.

# ClientInfoReqVal

# ClientInfoReqVal

This element indicates the response from the client for an extended information element.

# ClientInfoReqDeclineType

# ClientInfoReqDeclineType

This element indicates if the client declined to provide an answer to an extended information element.

# ClientInfoReqModTimeDt

# ClientInfoReqModTimeDt

This element represents the date and time the element was modified.

# CRMOffCode

# CRMOffCode

This element represents the unique code of the associate who last modified the element.

# CRMOffDesc

# CRMOffDesc

This element represents the name of the associate who last modified the element.

# Ver\_1

# Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **x\_ClientIntArray**

This array is a collection of client interest information that is associated with the service and contains the complex **XtendElem** element.

### **ClientIntInfo**

This element represents additional information for a client interest element.

### **ClientIntName**

This element represents the name of the client interest.

### **ClientIntCode**

This element represents the unique identifier for a client interest element.

### **ClientIntType**

This element indicates the client's response to a client interest element. Possible canonical values are *N/A*, *Int*, or *Decline*.

### **ClientIntModTimeDt**

This element represents the date and time the element was modified.

### **CRMOffCode**

This element represents the unique code of the associate who last modified the element.

### **CRMOffDesc**

This element represents the name of the associate who last modified the element.

### **Ver\_1**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **x\_ClientDemogrArray**

This array is a collection of client demographic information that is associated with the service and contains the complex **XtendElem** element.

## ClientDemogrInfo

This element represents additional information for a client demographic element.

## ClientDemogrName

This element represents the name of the client demographic element.

## ClientDemogrVal

This element represents a specific value that indicates the response from the client for a client demographic element.

## ClientDemogrDesc

This element represents the description of the value of the client demographic element.

# CRM Client Relationship Data Modify

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMClientRelDataMod

The CRM client relationship data modify service allows the service consumer to modify certain elements for a specific client relationship. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

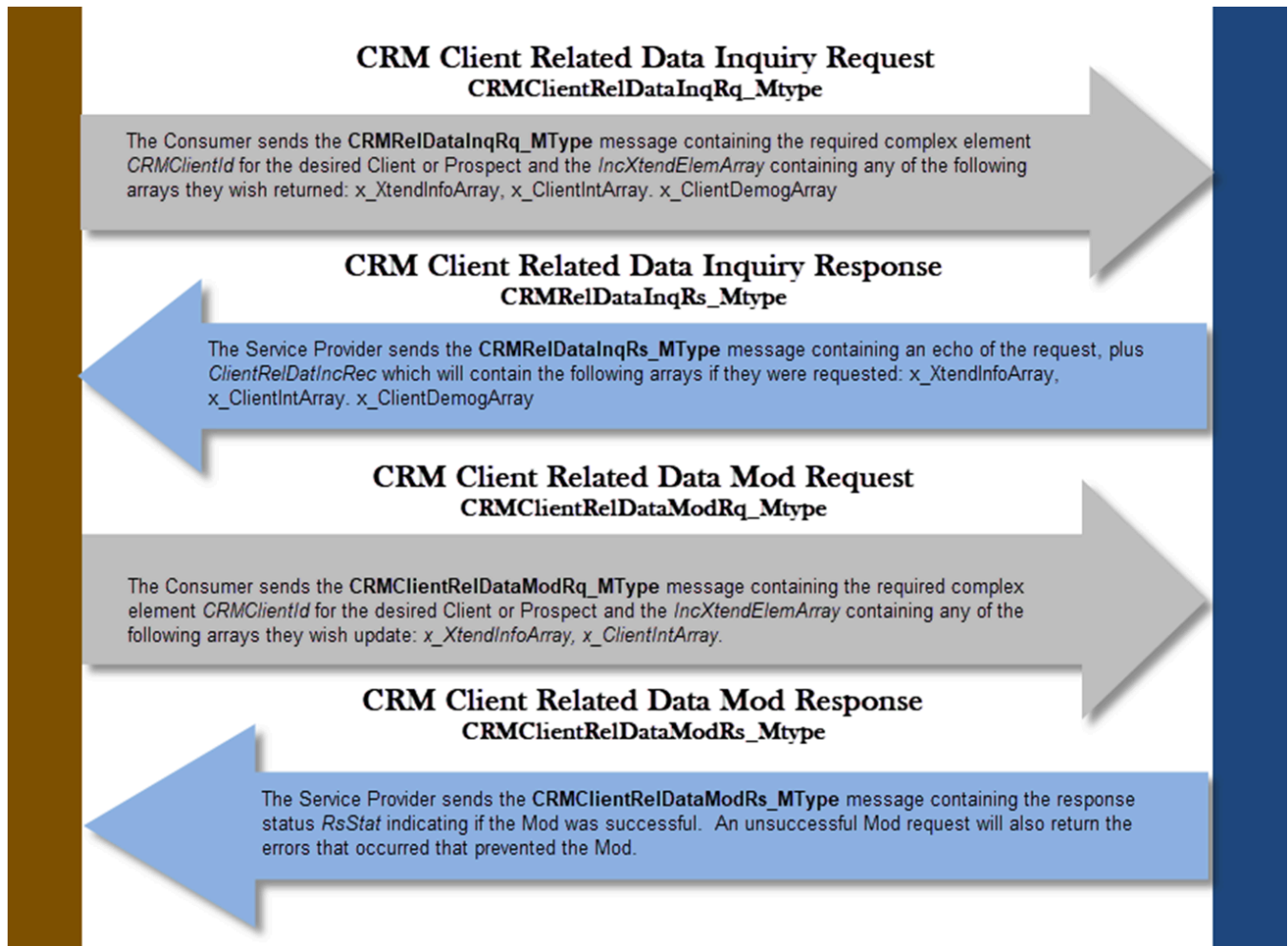
The CRM client relationship data modify service uses a typical exchange of `Mtype` messages to allow updates to the information for a specific client relationship, based on the client relationship ID. A client relationship inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

Additional information for each element is obtained through a Service Dictionary Search request.

## Message Flow



## Request

The third-party consumer forwards the `CRMClientRelDataMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMClientRelDataMod` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8205	Error	<i>The officer permission AllowExtCISView is set to False.</i>
8206	Error	<i>The officer permission AllowExtCISModify is set to False.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `ClientRelDataMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### NOTE

Synapsys does not support overrides for this array.

### ErrOvrRd (Optional)

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

#### NOTE

Synapsys does not support overrides for this element.

### ErrCode (Optional)

This element represents a valid error code that pertains to `CRMClientRelDataMod` request message.

#### NOTE

Synapsys does not support overrides for this element.

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>B122</ElemCanocVal>
      <ElemCanocValDesc>The officer does not have sufficient privileges to edit a Referral activity. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## CRMClientId (Required)

For clients or additional service only clients, when the core provider is not Symitar, this element represents a portfolio. When the core provider is Symitar only, it represents the MBRNumber. For prospects, this element represents a SSN.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8129	Error	<i>This element is required.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>
8193	Error	<i>The OvrrdInstRtId value that was provided is not valid.</i>

## CRMClientIdType (Optional)

This element indicates if the request is for an existing or potential client in Synapsys.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```
<SvcDictInfoRec>
  * * *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Ext</ElemCanocVal>
      <ElemCanocValDesc>Existing Client</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Pot</ElemCanocVal>
      <ElemCanocValDesc>Prospect</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  * * *
</SvcDictInfoRec>
```

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## XtendInfoArray (Optional)

This array is a collection of additional information that is associated with the service and contains the complex **XtendElem** element.

## XtendInfoRec (Optional)

This complex element contains a collection of simple elements and arrays.

### XtendInfoDetailArray (Optional)

This array is a collection of additional detailed information that is associated with the service.

## XtendInfoDetail (Optional)

## XtendInfoDetail (Optional)

This complex element contains a collection of simple elements and arrays.

## ClientInfoReqCode (Required)

## ClientInfoReqCode (Required)

This element represents the unique identifier for an extended information element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data type associated with the extended info element returned in **ElemCanocVal**. Possible values are: *Text*, *Date*, *Number* (decimals), and *Currency*.
- When **CanocValDetail** = *MaxLength*, **CanocValTxt** contains the max length allowed.
- When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** indicates the order in which the **Extended Info** field should appear.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>214</ElemCanocVal>
    <ElemCanocValDesc>Interested in other accounts</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CategoryId</CanocValDetail>
        <CanocValTxt>4</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValTxt>UDList</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>MaxLength</CanocValDetail>
        <CanocValTxt>150</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>5</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
    <SvcPrvdInfo></SvcPrvdInfo>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>2</ElemCanocVal>
    <ElemCanocValDesc>Email address</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CategoryId</CanocValDetail>
        <CanocValTxt>4</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValTxt>Text</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>MaxLength</CanocValDetail>
        <CanocValTxt>150</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>6</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
    <SvcPrvdInfo></SvcPrvdInfo>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>48</ElemCanocVal>
    <ElemCanocValDesc>Birth date</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CategoryId</CanocValDetail>
        <CanocValTxt>4</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValTxt>Date</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>MaxLength</CanocValDetail>
        <CanocValTxt>150</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>7</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
    <SvcPrvdInfo></SvcPrvdInfo>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# ClientInfoReqVal (Optional)

## ClientInfoReqVal (Optional)

This element indicates the response from the client for an extended information element.

This element allows for a maximum of 150 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8207	Error	<i>The element is defined as number and the value provided is not a valid number format.</i>
8208	Error	<i>The element is defined as date and the value provided is not a valid date format.</i>
8209	Error	<i>The element is defined as currency and the value provided is not a valid currency format.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

When the **ClientInfoReqCode** has a **DataType** of `UDList`, the **ClientInfoReqVal** returns the contents of the `UDList`. **ElemCanocVal** is the `UDList` item description. **ElemCanocValDesc** is the `UDList` item description.

- When **CanocValDetail** = `ClientInfoReqCode`, **CanocValTxt** contains the ID of the **ClientInfoRecCode** that the `UDList` item is associated to.
- When **CanocValDetail** = `PresentationOrdinal`, **CanocValTxt** indicates the order in which the `UDList` item should appear.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Yes</ElemCanocVal>
      <ElemCanocValDesc>Yes</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>ClientInfoReqCode</CanocValDetail>
          <CanocValTxt>214</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>No</ElemCanocVal>
      <ElemCanocValDesc>No</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>ClientInfoReqCode</CanocValDetail>
          <CanocValTxt>214</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>2</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

# ClientInfoReqDeclineType (Required)

# ClientInfoReqDeclineType (Required)

This element indicates if the client declined to provide an answer to an extended information element.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

<SvcDictInfoRec>
  * * *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>false</ElemCanocVal>
      <ElemCanocValDesc>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  * * *
</SvcDictInfoRec>

```

### ClientIntArray (Optional)

This array is a collection of client interest information that is associated with the service and contains the complex **XtendElem** element.

### ClientIntInfo (Optional)

This element represents additional information for a client interest element.

### ClientIntCode (Required)

This element represents the unique identifier for a client interest element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

**ElemCanocVal** is the ID of the Client Interest element. **ElemCanocValDesc** is the description of the Client Interest element. When **CanocValDetail** = *PresentationOrdinal*,

**CanocValTxt** indicates the order in which the Client Interest element appears.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1</ElemCanocVal>
      <ElemCanocValDesc>College Planning</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>20</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>2</ElemCanocVal>
      <ElemCanocValDesc>Insurance Services</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>40</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### ClientIntType (Required)

This element indicates the client's response to a client interest element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

**ElemCanocVal** contains the possible values of *N/A*, *Int*, and *Decline* for Client Interest elements. **ElemCanocValDesc** is the description of the possible values for Client Interest elements.

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```
<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>N/A</ElemCanocVal>
      <ElemCanocValDesc>N/A</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Int</ElemCanocVal>
      <ElemCanocValDesc>Interested</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Decline</ElemCanocVal>
      <ElemCanocValDesc>Decline</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  .
  .
  .
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMClientRelDataMod` response message to the service consumer which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

This element specifies the status of the modification request. Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## CRM Contact Events Services

Synapsys has messaging services for addition, search, inquiry, and modification of contact events information on service providers.

### CRM Event Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventSrch

The CRM event search service returns all events for a particular `InstRtId`, based on specified filter criteria. The request provides the following optional filters:

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)
- **CRMEventType** (required)
- **EventOffCode**(optional)
- **EventStatCode**(optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

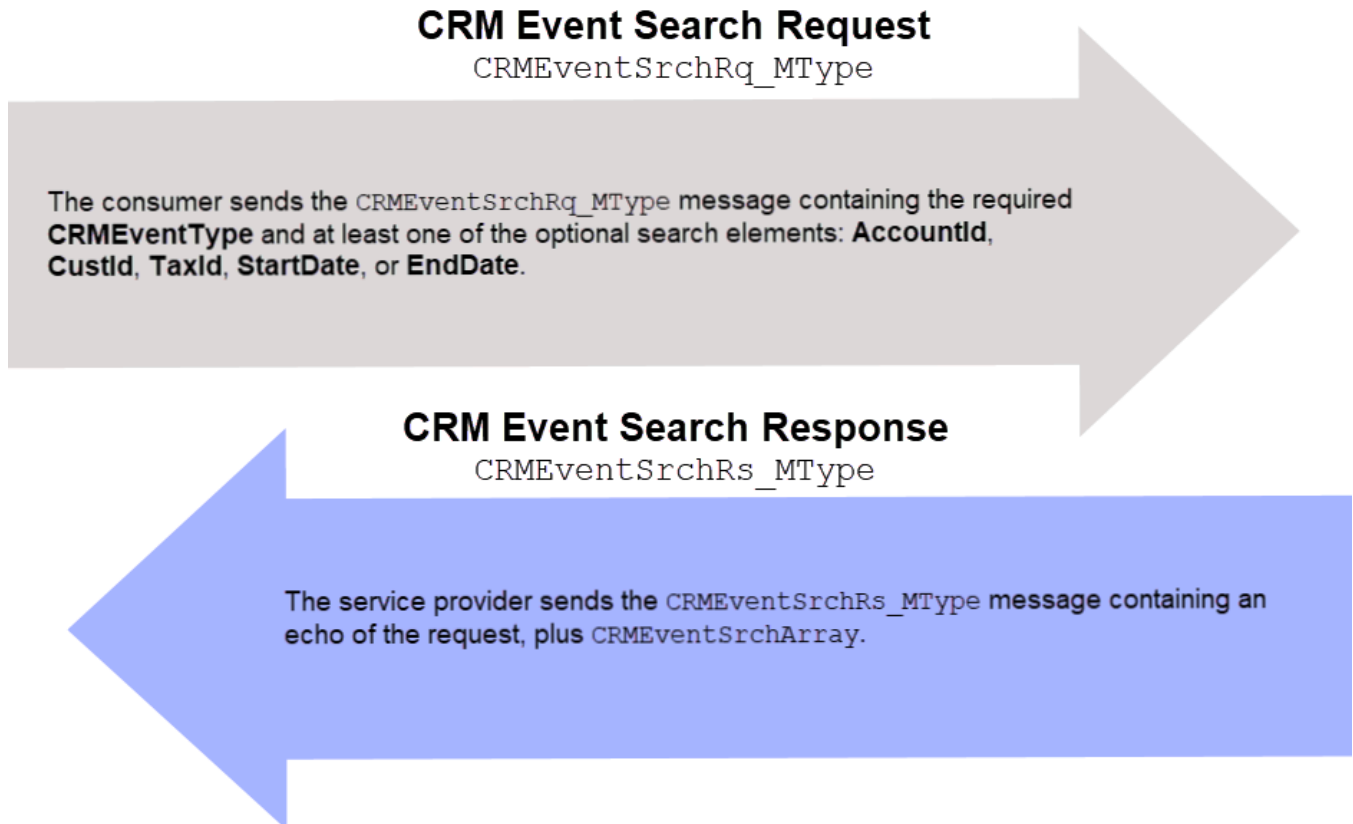
The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for

more information.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the `CRMEventSrchr` request message to the service provider.

The element `CRMEventType` and at least one of the following additional elements contained within the `CRMEventSrchr` request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMEventSrchr` service. Errors

that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8002	Warning	The officer permission AllowViewIncentiveEvents is set to Non-Automated.
8003	Warning	The officer permission AllowViewIncentiveEvents is set to None.
8009	Warning	No record(s) were found for the request received.
8069	Error	For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.
8196	Error	The officer permission AllowRelEx is set to False.

## CRMEvent Type

This element indicates the type of event to be searched.

Canonical values are:

- *CustCon* – Returns Synapsys sales events
- *All* – Returns Synapsys service, sales, contact, and incentive events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	CRMEvent Type is invalid.
8035	Error	CRMEvent Type is required.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>

## AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>2</ElemCanocVal>
    <ElemCanocValDesc>Checking Account</ElemCanocValDesc>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>11</ElemCanocVal>
    <ElemCanocValDesc>Personal Loan</ElemCanocValDesc>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### **StartDt (Optional)**

This optional element designates the starting point used for searching events based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available events that have an added date that is less than the specified **EndDt**.

### **EndDt (Optional)**

This optional element designates the ending point to use for searching events based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### **EventOffCode (Optional)**

This optional element aids in filtering events based on who they are currently referred to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional value is available.

- *CurUsr* - Filters events based on the officer that has been derived from the header sent along with the **CRMEventSrch** request.

### **EventStatCode (Optional)**

This element aids in filtering events based on their status. Valid status values may be sent.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional value is available:

- *Act* - Returns events that are not in a terminating status.

## Response

The service provider (Synapsys) returns the `CRMEventSrch` response message to the service consumer, which returns event records that meet the specified search criteria.

The following arrays are contained within the `CRMEventSrch` response message.

### CRMEventSrchArray

This element returns an array of responses for the event search and includes the `CRMEventSrchRec` complex element for each event record returned.

### CRMEventSrchRec

The `CRMEventSrchRec` complex element contains a package of data related to an event and includes the following simple elements.

### CRMEventType

This element indicates the type of event.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

### TaxId

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The `MaskVal` attribute value is set according to the system setting **MaskSSN**. In a multibank

environment, the **OvrrdInstRtId** attribute is supported.

### **CustId**

This element represents the portfolio of the customer whom the event belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CRMEventId**

This element represents the unique ID assigned to the event.

### **CRMEventDt**

This element represents the date that the event was created.

### **EventCrtOffCode**

This element represents the code for the associate who created the event.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **EventCrtOffDesc**

This element represents the name of the associate who created the event.

### **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

### **EventCmnt**

This element represents any comments for the event.

### **CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

### **EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

### **EventDueDate**

This element indicates the date that the event is needed by.

### **EventStatCode**

This element represents the status code of the event.

### **EventStatDesc**

This element represents the descriptive text of the status of the event.

## **CRMEventDesc**

This element represents the summary for the event.

## **EscDt**

This element represents the date that the event was escalated.

## **PersonName**

This complex element contains the following elements.

# ComName

# ComName

This element represents the customer's full name.

# FirstName

# FirstName

This element represents the customer's first name.

# LastName

# LastName

This element represents the customer's last name.

## **CRM Event Modify**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventMod

The CRM event modify feature allows the service consumer to modify certain elements for a specific event. The **CRMEventId**, **ActIntentKey**, and **CRMEventType** elements are required on the modified request.

The event modification service uses a typical exchange of `MessageType` messages to allow

updates to the information for a specific event, based on the event ID. An event Inquiry must be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## **Message Flow**

## CRM Event Inquiry Request

CRMEventInqRq\_MType

The consumer sends the `CRMEventInqRq_MType` message containing the required elements **CRMEventId** and **CRMEventType** for the desired event.

## CRM Event Inquiry Response

CRMEventInqRs\_MType

The service provider sends the `CRMEventInqRs_MType` message containing an echo of the request plus `CRMEventInfoRec`.

## CRM Event Mod Request

CRMEventModRq\_MType

The consumer sends the `CRMCustInqRq_MType` message containing the required complex element `CRMClient` with the required simple element **CRMClientId** for the desired customer.

## CRM Event Mod Response

CRMEventModRs\_MType

The service provider sends the `CRMEventModRs_MType` message containing the response status **RsStat** indicating if the mod was successful. An unsuccessful mod request also returns the errors that prevented the mod.

## Request

The third-party consumer forwards the `CRMEventMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMEventMod` service. Errors that pertain specifically to an element are listed with that element.

<b>Error ID</b>	<b>Category</b>	<b>CRMEventType</b>	<b>Description</b>
8114	Fault	<b>CustCon</b>	<i>The officer permission <code>AllowViewPvtEvent</code> is set to <code>False</code>.</i>
8124	Fault	<b>CustCon</b>	<i>The officer permission <code>AllowActivitiesView</code>, which also controls the ability to view events, is set to <code>False</code>.</i>
8167	Fault	<b>CustCon</b>	<i>The officer does not have sufficient privileges to edit.</i>
8196	Error	<b>CustCon</b>	<i>The officer permission <code>AllowRelEx</code> is set to <code>False</code>.</i>
8201	Error	<b>CustCon</b>	<i>The officer does not have permission to view an event with this <code>EventCatCode</code>.</i>

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

### **ErrOvrRdInfoArray (Optional)**

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### **ErrOvrRd**

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

## ErrCode

This element represents a valid error code that pertains to `CRMEventMod` request message.

The following error codes are valid for this request message.

Error Id	Category	CRMEventType	Description
8114	Fault	CustCon	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8119	Fault	CustCon	<i>Officer requesting does not have sufficient privileges to delete.</i>
8124	Fault	CustCon	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8138	Fault	CustCon	<i>A required user defined field was not supplied.</i>
8167	Fault	CustCon	<i>The officer does not have sufficient privileges to edit.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMEventType	Description
8007	Warning	CustCon	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

```
<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>8114</ElemCanocVal>
    <ElemCanocValDesc> The officer permission AllowViewPvtEvent is set to
      False.</ElemCanocValDesc>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>8116</ElemCanocVal>
    <ElemCanocValDesc>CanReceiveServiceEvents = False for the officer this event is being
      assigned to.</ElemCanocValDesc>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>
```

## CRMEventId (Required)

This element represents a specific event being modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8029	Error	<i>CRMEventId is invalid.</i>
8030	Error	<i>CRMEventId is required.</i>

## CRMEventType (Required)

This element indicates the type of event to be added.

The value *CustCon* is sent to indicate that a contact event is modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Events</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## CRMEventInfoRec (Required when Dlt = false, Optional when Dlt = true)

The CRMEventInfoRec complex element contains a package of data related to an event and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>

## CRMEventDesc (Optional)

This element represents the summary for the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

## EventOffCode (Optional)

This element represents the code for the associate whom the event is assigned to. If not provided, the event is assigned to the user that is submitting the Synapsys CRM Service request.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8058	Error	<i>EventOffCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventCmnt (Optional)

This element represents any comments for the event.

The following errors, warnings, or faults may occur with this element.

### NOTE

Comments that are sent are appended to existing comments.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

## CRMEventRecv (Optional)

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

When **UsePrivateEventFlag** is *False*, the **EventPrivType** is not supported. Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8059	Error	<i>EventPrivType is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>true</ElemCanocVal>
    <ElemCanocValDesc>true</ElemCanocValDesc>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>>false</ElemCanocVal>
    <ElemCanocValDesc>>false</ElemCanocValDesc>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### EventDueDt (Optional)

This element indicates the date needed by for the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### EventStatCode (Optional)

This element represents the status code of the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *IsTerminating*, **CanocValTxt** contains *True* or *False* indicating if the status represented in **ElemCanocVal** is a terminating status or not.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order in which the **EventStatCode** values should display.

```

<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>3</ElemCanocVal>
    <ElemCanocValDesc>New Event</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>1</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsTerminating</CanocValDetail>
        <CanocValTxt>False</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>

```

## EventCatCode (Required)

This element represents the type of event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order the **EventCatCode** values should be displayed in.
  - When **CanocValDetail** = *PublishCreate*, **CanocValTxt** contains `true` or `false` indicating if **Create** is enabled for the 750 - Contact Event for Enterprise Event System (EES).
  - When **CanocValDetail** = *PublishUpdate*, **CanocValTxt** contains `true` or `false` indicating if **Update** is enabled for the 750 - Contact Event for Enterprise Event System (EES).
  - When **CanocValDetail** = *PublishDelete*, **CanocValTxt** contains `true` or `false` indicating if **Delete** is enabled for the 750 - Contact Event for Enterprise Event System (EES).

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Commercial Lending</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>EventOffCodeDft</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishCreate</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishUpdate</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishDelete</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMOffArray (Optional)

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

### CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText

# CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

Passing **JHANull** = *True* on this element has no effect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- `CanocValInfoArray` contains all the possible officers available for the value specified in **ElemCanocVal**.
  - **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
  - **CanocValText** represents the name of the associate represented in **CanocValDetail**.

**NOTE**

When **EventPrivType** is changed to `True`, the values for **EventOffCode** and **EventOffCodeText** can be retrieved again using the Service Dictionary Search with the **EventPrivType** filter.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended for the
      SecondaryAssoc1 field.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>CC</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended as a cc
      officer.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

Passing **JHANull** = *True* on this element causes the **CRMOffCode** and **CRMOffCodeText** to be cleared.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

## UserDefCode

# UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

Passing **JHAnull** = *True* on this element causes the field being referenced in this element to be blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8089	Error	<i>UserDefCode is invalid.</i>
8090	Error	<i>UserDefCode is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values are: *UDList, Text, Date, Number (decimals), Integer (no decimals), Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *IsRequired*, **CanocValTxt** contains *True* or *False* to indicate if the user-defined field returned in **ElemCanocVal** is required or not.
  - When **CanocValDetail** = *DataLength*, **CanocValTxt** contains the max length allowed. This information is only provided when the datatype is text, integer, or number.
  - When **CanocValDetail** = *EventCatCode*, **CanocValTxt** indicates the **EventCatCode** the user-defined field returned in **ElemCanocVal** is associated with.
  - When **CanocValDetail** = *UDPresentationOrdinal*, **CanocValTxt** indicates the order in which the user-defined field should appear.

```

<ElemCanocRec>
  <ElemCanocVal>CMTaskEvent11</ElemCanocVal>
  <ElemCanocValDesc>Invited to Annual Event</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Text</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>DataLength</CanocValDetail>
      <CanocValTxt>60</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>282</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>11</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

# UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8096	Error	<i>The &lt;UserDefCode&gt; is defined as a Date and &lt;UserDefTxt&gt; is not a date.</i>
8098	Error	<i>UserDefTxt is invalid.</i>
8101	Error	<i>UserDefTxt is required.</i>

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the friendly text that appears in drop-down menus when the associated data type of the **UserDefCode** is *UDList*, *Officer*, *Branch*, *Application*, or *ClientAccount*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode**, which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is always necessary to provide **UserDefCode** for every user-defined field that is being modified.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal**, which indicates the user-defined field to associate the value with. It is always necessary to provide `UserDefText` for every user-defined field that is being modified.
  - When **CanocValDetail** = *PresentationOrdinal*, `CanocValTxt` indicates the order the value appears in the drop-down menu on the form and is only provided when the data type is *UDList*.

```

<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>Yes</ElemCanocVal>
    <ElemCanocValDesc>Yes</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>CMTaskEvent1</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefText</CanocValDetail>
        <CanocValTxt>772</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>1</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>No</ElemCanocVal>
    <ElemCanocValDesc>No</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>CMTaskEvent1</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefText</CanocValDetail>
        <CanocValTxt>773</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>2</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>

```

## Dlt (Optional)

This element represents the deletion of the specified event.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### **WorkflowProcStat**

This complex element indicates whether a record is under the control of a workflow process.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>

### **RmndSchedEnable**

This element represents a reminder schedule tied to the CRM event category code.

### **Response**

The service provider (Synapsys) returns the `CRMEventMod` response message to the service consumer which contains the following simple elements.

### **RsStat**

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Event Add

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventAdd

The CRM event add service allows the service consumer to add a contact, incentive, sales, or service event into the Synapsys database. The consumer must provide the following:

- A valid **CRMEventType**
- A unique customer identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

- Any required elements that are part of the `CRMEventInfoRec` complex element for the event.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

### CRM Event Add Request

`CRMEventAddRq_MType`

The consumer sends the `CRMEventAddRq_MType` message containing the required element and a unique customer or prospect identified by **CustId**, **CRMRelCode**, or **TaxId** as well as any required elements that are part of the `CRMEventInfoRec` complex element for the type of event that is being added.

### CRM Event Add Response

`CRMEventAddRs_MType`

The service provider sends the `CRMEventAddRs_MType` message containing an echo of the request plus the response status **RsStat** indicating if the add was successful. If the add was successful, the **EventId** assigned to the new event is also returned. An unsuccessful add request returns the errors that prevented the add.

## Request

The third-party consumer forwards the `CRMEventAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMEventAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8107	Fault	The officer permission AllowActivitiesCreate is set to False.
8166	Error	The financial institution has chosen not to enable Contact Events.
8196	Error	The officer permission AllowRelEx is set to False.

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrOvrRd

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the specific **CRMEventType** being requested for the `CRMEventAdd` request message.

The following error codes are valid for this request message.

Error ID	Category	Description
8107	Fault	The officer permission AllowActivitiesCreate is set to False.
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8138	Fault	A required user defined field was not

Error ID	Category	Description
		<i>supplied.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the</i>

Error ID	Category	Description
		<i>Synapsys database.</i>

### CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>

### CRMEventType (Required)

This element indicates the type of event to be added.

The value *CustCon* is sent to indicate that a contact event is added.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>CustCon</ElemCanocVal>
        <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
      </ElemCanocRec>
    </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMEventInfoRec (Required)

This element represents the summary for the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>

## CRMEventDesc (Optional)

This element represents the summary for the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### EventOffCode (Optional)

This element represents the code for the associate whom the event is assigned to.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8058	Error	<i>EventOffCode is invalid.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `IsQueueOfficer`, **CanocValTxt** contains `true` or `false` indicating if the associate represented in **ElemCanocVal** is a queue officer or not.

#### CAUTION

When the **EventStatCode** is a terminating status, **EventOffCode** should not be set to a queue.

### CAUTION

When **EventOffCode** is changed, the values for **EventStatCode** should be retrieved again using the **SvcDictSrch** with the **EventOffCode** filter.

- When **CanocValDetail** = *AllowViewPvtEvent*, **CanocValTxt** contains *true* or *false* indicating if the associate represented in **ElemCanocVal** can receive private events.

### CAUTION

When **EventPrivType** is *True*, **EventOffCode** should not be set to an associate that has **AllowViewPvtEvent** = *False*.

### CAUTION

When **EventPrivType** is changed to *True*, the values for **EventOffCode** can be retrieved again using the **SvcDictSrch** with the **EventPrivType** filter.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>TMZ</ElemCanocVal>
      <ElemCanocValDesc>Trudy ██████████</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsQueueOfficer</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally ██████████</ElemCanocValDesc>
      </ElemCanocRec>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsQueueOfficer</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## EventCmnt (Optional)

This element represents any comments for the event.

## CRMEventRecv (optional)

This element indicates whether the event is marked read by the associate that it is

assigned to.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8059	Error	<i>EventPrivType is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventDueDt (Optional)

This element indicates the date that the event is needed by.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>

## EventStatCode (Required)

This element represents the status code of the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>
8061	Error	<i>EventStatCode is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *IsTerminating*, **CanocValTxt** contains *true* or *false* indicating if the status represented in **ElemCanocVal** is a terminating status or not.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order the **EventStatCode** values should be displayed in.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>False</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventCatCode (Required)

This element represents the type of event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains a numeric representation of the order the category displays in within a grouping.
- When **CanocValDetail** = *PublishCreate*, **CanocValTxt** contains `true` or `false` indicating if **Create** is enabled for the 750 - Contact Event for Enterprise Event System (EES).
- When **CanocValDetail** = *PublishUpdate*, **CanocValTxt** contains `true` or `false` indicating if **Update** is enabled for the 750 - Contact Event for Enterprise Event System (EES).
- When **CanocValDetail** = *PublishDelete*, **CanocValTxt** contains `true` or `false` indicating if **Delete** is enabled for the 750 - Contact Event for Enterprise Event System (EES).

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>New Account Opening</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishCreate</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishUpdate</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishDelete</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMOffArray (Optional)

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- `CanocValInfoArray` contains all the possible associates available for the value specified in **ElemCanocVal**.

- **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
- **CanocValText** represents the name of the associate represented in **CanocValDetail**.

```

< SvcDictInfoRec>
  .
  .
  .
  < ElemCanocArray>
    < ElemCanocRec>
      < ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    < ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended to be a secondary assigned associate.</ElemCanocValDesc>
    < CanocValInfoArray>
      < CanocValInfo>
        < CanocValDetail>TMZ</CanocValDetail>
        < CanocValTxt>Trudy ████████ - TMZ -- 0086</CanocValTxt>
      </CanocValInfo>
      < CanocValInfo>
        < CanocValDetail>CWR</CanocValDetail>
        < CanocValTxt>Chad ████████ - CWR -- 0086</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  < ElemCanocRec>
    < ElemCanocVal>CC</ElemCanocVal>
    < ElemCanocValDesc> Indicates that the CRMOffCode being passed is intended to be a cc associate. </ElemCanocValDesc>
    < CanocValInfoArray>
      < CanocValInfo>
        < CanocValDetail>TMZ</CanocValDetail>
        < CanocValTxt>Trudy ████████ - TMZ -- 0086</CanocValTxt>
      </CanocValInfo>
      < CanocValInfo>
        < CanocValDetail>CWR</CanocValDetail>
        < CanocValTxt>Chad ████████ - CWR -- 0086</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
< SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

# CRMOffCode

# CRMOffCode

This element represents the code of the associate that is affiliated with the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8038	Error	Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.
8039	Error	CRMOffCode is required.
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8201	Error	The officer does not have permission to view

Error ID	Category	Description
		<i>an event with this EventCatCode.</i>

### UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>

### UserDefInfo

The **UserDefInfo** contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

## UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

The following errors, warnings, or faults may occur with **UserDefCode**.

Error ID	Category	Description
8089	Error	<b>UserDefCode</b> is invalid.
8090	Error	<b>UserDefCode</b> is required.

The following elements are a partial XML example of what is returned in the `SvcDictInfoArray` of Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **UserDefCode**.
- **ElemCanocValDesc** represents the friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data types associated with the user-defined field stored in **ElemCanocVal**. Possible values are: *UDList, Text, Date, Number (decimals), Integer (no decimals), Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *IsRequired*, **CanocValTxt** contains *true* or *false* to indicate if the user-defined field returned in **ElemCanocVal** is required or not.
  - When **CanocValDetail** = *EventCatCode*, **CanocValTxt** indicates if the **EventCatCode** the user-defined field returned in **ElemCanocVal** is associated.
  - When **CanocValDetail** = *UDPresentationOrdinal*, **CanocValTxt** indicates the order the user-defined field should appear within a grouping on a service event form.
  - When **CanocValDetail** = *DataLength*, **CanocValTxt** contains a numeric value indicating the max datalength allowed. This value will only be returned when **DataType** = *Text, Number (decimals), or Integer (no decimals)*.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CMTaskEvent1</ElemCanocVal>
      <ElemCanocValDesc>New Account</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>UDList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCatCode</CanocValDetail>
          <CanocValTxt>154</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>DataLength</CanocValDetail>
          <CanocValTxt>60</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
          <CanocValTxt>6</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

# UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8096	Error	<i>The &lt;UserDefCode&gt; is defined as a Date and &lt;UserDefTxt&gt; is not a date.</i>

Error ID	Category	Description
8098	Error	<i>UserDefTxt is invalid.</i>
8101	Error	<i>UserDefTxt is required.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the friendly text that appears in drop-down lists when the associated data type of the **UserDefCode** is one of the following: *UDList, Officer, Branch, Application, or ClientAccount*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode** which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is necessary to provide **UserDefCode** for the following data types: *UDList, Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal** which indicates the user-defined field to associate the value with. It is necessary to provide **UserDefTxt** for the following data types: *UDList, Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order the values should be displayed in.

## WorkflowProcStat (Optional)

This complex element indicates whether a record is under the control of a workflow process.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

## RmndSchedEnable (Optional)

This element represents the use of on boarding ticklers.

Canonical values are:

- *True*
- *False*

When the value is *True*, on boarding ticklers are created according to how they have been defined in **System Maintenance**.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8168	Error	<i>RmndSchedEnable is invalid.</i>
8175	Error	<i>RmndSchedEnable is not supported when EventStatCode is a terminating status.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

< SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## Response

The service provider (Synapsys) returns the `CRMEventAdd` response message to the service consumer which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

# CRM Event Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventInq

The CRM event inquiry service returns element details for a specific event. The event identification element **CRMEventId** and the event type **CRMEventType** are required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to event information.

The event inquiry service uses a typical exchange of *Mtype* messages to retrieve profile information for a specific event, based on the event ID and type of event. If the event ID is not known, the consumer must first perform an event search to obtain the event ID for the desired event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Event Search Request

CRMEventSrchrq\_MType

The consumer sends the CRMEventSrchrq\_MType message containing the required element **CRMEventType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

### CRM Event Search Response

CRMEventSrchrS\_MType

The service provider sends the CRMEventSrchrS\_MType message containing an echo of the request, plus CRMEventSrchrArray.

### CRM Event Inquiry Request

CRMEventInqrq\_MType

The consumer sends the CRMEventInqrq\_MType message containing the required elements **CRMEventId** and **CRMEventType** for the desired event.

### CRM Event Inquiry Response

CRMEventInqrS\_MType

The service provider sends the CRMEventInqrS\_MType message containing an echo of the request, plus CRMEventInfoRec.

## Request

The third-party consumer forwards the CRMEventInq request message to the service provider.

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMEventInq` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>

**AuthenUsrCred (Optional)**

This complex element represents the authentication of the end-user credentials in the form of a WS Security Element. It contains a single SAML V2.0 Assertion.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

**CRMEventId (Required)**

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8030	Error	<i>CRMEventId is required.</i>

## CRMEventType (Required)

This element indicates the type of event to be searched.

The value *CustCon* is sent to indicate that a contact event is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## IncXtendElemArray (Optional)

This array is used to request additional, optional information pertaining to the service event.

### IncXtendElemInfo

The `IncXtendElemInfo` complex element contains a single record indicating the additional optional information being requested.

### XtendElem

This element represents the additional, optional information being requested. Currently, `x_CRMRelActArray` and `x_CRMAuditHistArray` are the only supported values.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMEventInq` response message to the service consumer, which returns element details for a specific event based on the **CRMEventId** that was requested.

The following arrays, simple, and complex elements are contained within the `CRMEventInq` response applicable for Synapsys CRM Services.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the

inquiry response.

## **CRMEventInqRec**

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

### **CRMEventInfoRec**

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

#### **CRMEventDt**

This element represents the date that the event was created.

#### **CRMEventDesc**

This element represents the summary for the event.

#### **EventCrtOffCode**

This element represents the code for the associate who created the event.

#### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

#### **EventCmnt**

This element represents any comments for the event.

#### **CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

## EventPrivType

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

## EventDueDt

This element indicates the date that the event is needed by.

## EventStatCode

This element represents the status code of the event.

## EventCatCode

This element represents the type of event.

## CRMOffArray

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

# CRMOffRec

# CRMOffRec

This element contains a collection of simple elements.

# CRMOffCodeText

# CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*

- *CC*

## CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

## CRMOffDesc

## CRMOffDesc

This element represents the name of the associate that is affiliated with the event.

### **UserDefinedArray**

This complex element contains the following elements.

## UserDefInfo

## UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

## UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

## UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

## UserDefDesc

# UserDefDesc

This element represents the description of the additional information that is related to the event.

## **EscltDt**

This element represents the date that the event was escalated.

## **WorkflowProcStat**

This complex element indicates whether a record is under the control of a workflow process.

## **RmndSchedEnable**

This element represents a reminder schedule tied to the CRM event category code.

## **CRMEventId**

This element represents the unique ID assigned to the event.

## **CRMEventType**

This element indicates the type of event.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

## **CustId**

This element represents the portfolio of the customer whom the event belongs to.

## **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

## **TaxId**

This element represents the Social Security Number or tax ID of the customer or prospective customer that the activity belongs to.

## **EventCrtOffDesc**

This element represents the name of the associate who created the event.

## **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

## **EventStatDesc**

This element represents the descriptive text of the status of the event.

## **EventCatDesc**

This element represents the descriptive text of the category of the event.

## **x\_CRMRelActArray**

When requested, this array is used to return related activities pertaining to the contact event.

## **CRMRelActInfo**

When requested, this array is used to return related activities pertaining to the contact event.

## **CRMActType**

This element indicates the type of activity.

## **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

**CRMActDt**

This element represents the date that the activity was added.

**ActCrtOffDesc**

This element represents the name of the associate who created the activity.

**CRMActStatDesc**

This element represents the descriptive value of the status that is associated with the activity.

**CRMActRmk**

This element represents the purpose of the activity.

## CRM Incentive Events Services

Synapsys has messaging services for the search of incentive events information on service providers.

### CRM Event Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventSrch

The CRM event search service returns all events for a particular `InstRtId`, based on specified filter criteria. The request provides the following optional filters:

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)
- **CRMEventType** (required)
- **EventOffCode**(optional)
- **EventStatCode**(optional)

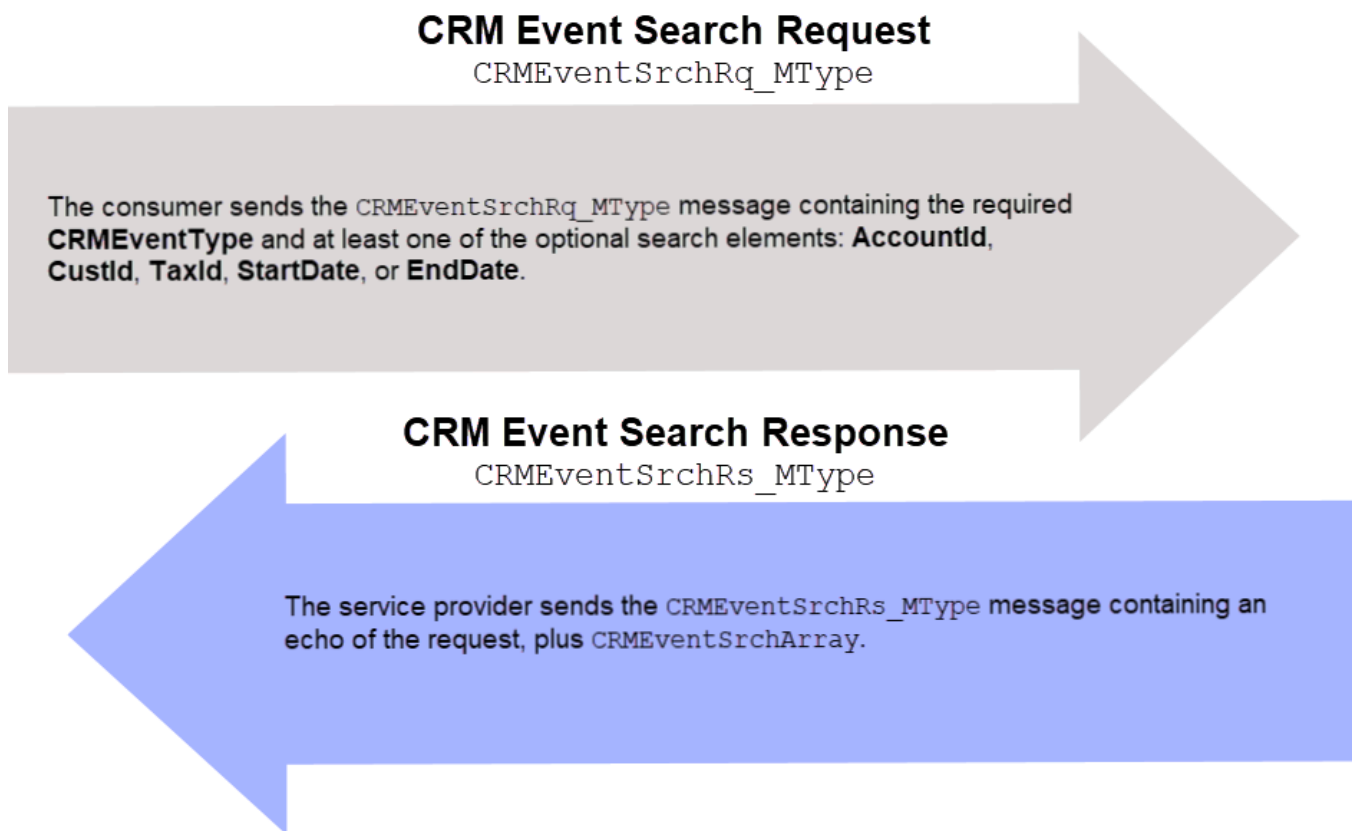
When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the `CRMEventSrch` request message to the service provider.

The element `CRMEventType` and at least one of the following additional elements contained within the `CRMEventSrch` request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMEventSrch` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8002	Warning	<i>The officer permission AllowViewIncentiveEvents is set to Non-Automated.</i>
8003	Warning	<i>The officer permission AllowViewIncentiveEvents is set to None.</i>
8009	Warning	<i>No record(s) were found for the request received.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMEventType

This element indicates the type of event.

Canonical values are:

- *Incen* - Synapsys incentive events
- *All* - Returns Synapsys service, sales, contact, and incentive events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8035	Error	<i>CRMEventType is required.</i>

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>

### AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

### CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match

must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### StartDt (Optional)

This optional element designates the starting point used for searching events based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available events that have an added date that is less than the specified **EndDt**.

### EndDt (Optional)

This optional element designates the ending point to use for searching events based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### EventOffCode (Optional)

This optional element aids in filtering events based on who they are currently referred to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional value is available.

- *CurUsr* - Filters events based on the officer that has been derived from the header sent along with the **CRMEventSrch** request.

## EventStatCode (Optional)

This element aids in filtering events based on their status. Valid status values may be sent.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional value is available:

- *Act* - Returns events that are not in a terminating status.

## Response

The service provider (Synapsys) returns the `CRMEventSrch` response message to the service consumer, which returns a list of event records that meet the specified search criteria.

The following arrays are contained within the `CRMEventSrch` response message.

## CRMEventSrchArray

This element returns an array of responses for the event search and includes the `CRMEventSrchRec` complex element for each event record returned.

## CRMEventSrchRec

The `CRMEventSrchRec` complex element contains a package of data related to an event and includes the following simple elements.

## CRMEventType

This element represents the associated event's type.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events

- *Incen* - Synapsys Incentive Events

### **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CustId**

This element represents the portfolio of the customer whom the event belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CRMEventId**

This element represents the unique ID assigned to the event.

### **CRMEventDt**

This element represents the date that the event was created.

### **EventCrtOffCode**

This element represents the code for the associate who created the event.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **EventCrtOffDesc**

This element represents the name of the associate who created the event.

### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

### **EventCmnt**

This element represents any comments for the event.

### **CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

### **EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

### **EventStatCode**

This element represents the status code of the event.

### **EventStatDesc**

This element represents the descriptive text of the status of the event.

### **CRMEventDesc**

This element represents the summary for the event.

## PersonName

This complex element contains the following elements.

# ComName

# ComName

This element represents the customer's full name.

# FirstName

# FirstName

This element represents the customer's first name.

# LastName

# LastName

This element represents the customer's last name.

## CRM Sales Events Services

Synapsys has messaging services for the addition, search, inquiry, and modification of sales events information on service providers.

### CRM Event Add

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMEventAdd**

The CRM event add service allows the service consumer to add a contact, incentive, sales, or service event into the Synapsys database. The consumer must provide the following:

- A valid **CRMEventType**
- A unique customer identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**

- **TaxId**

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

- Any required elements that are part of the `CRMEventInfoRec` complex element for the event.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the event.

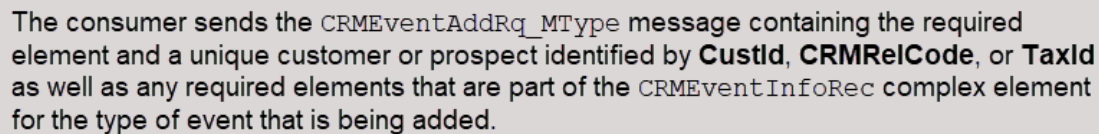
The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

### CRM Event Add Request

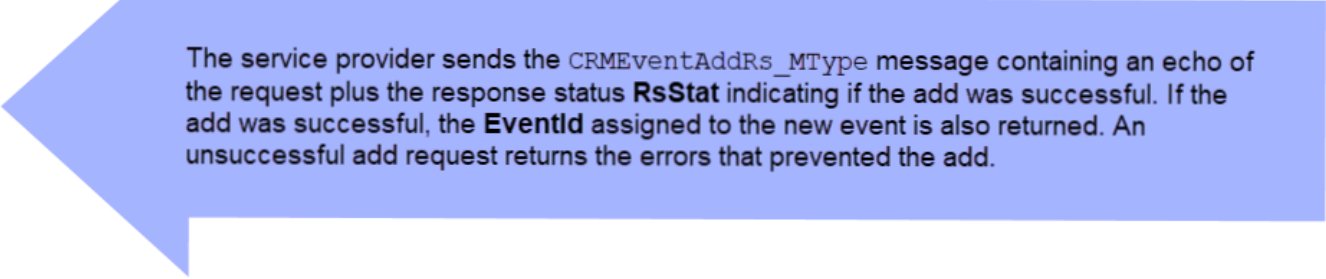
`CRMEventAddRq_MType`



The consumer sends the `CRMEventAddRq_MType` message containing the required element and a unique customer or prospect identified by **CustId**, **CRMRelCode**, or **TaxId** as well as any required elements that are part of the `CRMEventInfoRec` complex element for the type of event that is being added.

### CRM Event Add Response

`CRMEventAddRs_MType`



The service provider sends the `CRMEventAddRs_MType` message containing an echo of the request plus the response status **RsStat** indicating if the add was successful. If the add was successful, the **EventId** assigned to the new event is also returned. An unsuccessful add request returns the errors that prevented the add.

## Request

The third-party consumer forwards the `CRMEventAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMEventAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8160	Error	<i>The financial institution has chosen not to enable Sales Events.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventAdd` request message.

## ErrOvrRd

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

## ErrCode

This element represents a valid error code that pertains to the specific **CRMEventType** requested for the `CRMEventAdd` request message.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8107	Fault	The officer permission AllowActivitiesCreate is set to False.
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8138	Fault	A required user defined field was not supplied.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	The ErrCode is invalid.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio

within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

### **CRMRelCode (Optional)**

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

### **TaxId (Optional)**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

## CRMEventType (Required)

This element indicates the type of event to be added.

The value *Sale* is sent to indicate that a sales event is added.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMEventInfoRec (Required)

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>

### CRMEventDesc (Optional)

This element represents the summary for the event.

When **CRMEventDesc** is not provided for sales events, the summary defaults to the text of the type (**EventCatCode**) that was provided.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8184	Error	<i>The field is locked down on an event that is created from a PSO.</i>

### EventOffCode (Optional)

This element represents the code for the associate whom the event is assigned to.

If not provided when **CRMEventType** = *Sale*, the event is assigned to the default officer associated with the sales event type (**EventCatCode**). Otherwise, the event is assigned to the user that is submitting the Synapsys CRM service request.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8058	Error	<i>EventOffCode is invalid.</i>

Error ID	Category	Description
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *IsQueueOfficer*, **CanocValTxt** contains *true* or *false* indicating if the associate represented in **ElemCanocVal** is a queue officer or not.

**CAUTION**

When the **EventStatCode** is a terminating status, **EventOffCode** must not be set to a queue.

**CAUTION**

When **EventOffCode** is changed, the values for **EventStatCode** are retrieved again using the **SvcDictSrch** with the **EventOffCode** filter.

- When **CanocValDetail** = *AllowViewPvtEvent*, **CanocValTxt** contains *true* or *false* indicating if the associate represented in **ElemCanocVal** can receive private events.

**CAUTION**

When **EventPrivType** is *True*, **EventOffCode** must not be set to an associate that has **AllowViewPvtEvent** = *False*.

**CAUTION**

When **EventPrivType** is changed to *True*, the values for **EventOffCode** can be retrieved again using the **SvcDictSrch** with the **EventPrivType** filter.

```

<SvcDictInfoRec>
  * * *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████ </ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsQueueOfficer</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████ </ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsQueueOfficer</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  * * *
</SvcDictInfoRec>

```

## EventCmnt (Optional)

This element represents any comments for the event.

## CRMEventRecv (Optional)

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8059	Error	<i>EventPrivType is invalid.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

When the system setting **UsePrivateEventFlag** is set to *false*, this element is not returned in the **SvcDictSrchrRs**.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventDueDt (Optional)

This element indicates the date needed by for the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>

### EventStatCode (Required in Certain Scenarios)

This element represents the status code of the event.

**EventStatCode** is not required when **CRMEventType** = *Sale* and there is a default status associated with the **EventCatCode** that is sent.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>
8061	Error	<i>EventStatCode is required.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *CRMTerRsnDescRequired*, **CanocValTxt** contains *true* or *false* indicating if the termination reason (**CRMTerRsnDesc**) is required.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order the **EventStatCode** values appear in.
  - When **CanocValDetail** = *IsTerminating*, **CanocValTxt** contains **0** = *False* or **1** = *True*.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>CRMTerRsnDescRequired</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>CRMTerRsnDescRequired</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventCatCode (Required)

This element represents the type of event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8056	Error	<i>EventCatCode is required.</i>
8186	Error	<i>The value provided must match the default intended for this element based on PSO that was provided.</i>

Error ID	Category	Description
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `EventOffCodeDft`, **CanocValTxt** contains the default value for **EventOffCode**.

**CAUTION**

When a value is provided, **EventOffCode** must be updated to the new default associate.

- When **CanocValDetail** = `PresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the **EventCatCode** values appear in.
- When **CanocValDetail** = `SalesEventTypeUsage`, **CanocValTxt** contains the value to indicate where the type is used.
- When **CanocValDetail** = `PublishCreate`, **CanocValTxt** contains `true` or `false` indicating if **Create** is enabled for the 750 - Sales Event for Enterprise Event System (EES).
- When **CanocValDetail** = `PublishUpdate`, **CanocValTxt** contains `true` or `false` indicating if **Update** is enabled for the 750 - Sales Event for Enterprise Event System (EES).
- When **CanocValDetail** = `PublishDelete`, **CanocValTxt** contains `true` or `false` indicating if **Delete** is enabled for the 750 - Sales Event for Enterprise Event System (EES).

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Commercial Lending</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>EventOffCodeDft</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>SalesEventTypeUsage</CanocValDetail>
          <CanocValTxt>Both</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishCreate</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishUpdate</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishDelete</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

**CRMOffArray (Optional)**

This array is a collection of associates that are associated with the event and contains the complex CRMOffRec element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText

## CRMOffCodeText

The **CRMOffCodeText** element represents the affiliation the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- `CanocValInfoArray` contains all the possible officers available for the value specified in `ElemCanocVal`.
  - **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
  - **CanocValText** represents the name of the associate represented in **CanocValDetail**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended for the
    SecondaryAssoc1 field.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>CC</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended as a cc
    officer.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>

### UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

## UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

The following errors, warnings, or faults may occur with **UserDefCode**.

Error ID	Category	Description
8089	Error	<b>UserDefCode</b> is invalid.
8090	Error	<b>UserDefCode</b> is required.

The following elements are a partial XML example of what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **UserDefCode**.
- **ElemCanocValDesc** represents the friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values are: *UDList*, *Text*, *Date*, *Number* (decimals), or *Integer* (no decimals).
  - When **CanocValDetail** = *IsRequired*, **CanocValTxt** contains *true* or *false* to indicate if the user-defined field returned in **ElemCanocVal** is required.
  - When **CanocValDetail** = *EventCatCode*, **CanocValTxt** indicates if the **EventCatCode** the user-defined field returned in **ElemCanocVal** is associated with the event.
  - When **CanocValDetail** = *UDPresentationOrdinal*, **CanocValTxt** indicates the order the user-defined field should appear within a grouping on a sales event form.
  - When **CanocValDetail** = *MaxLength*, **CanocValTxt** contains a numeric value indicating the max data length allowed. This value is only returned when **DataType** = *Text*, *Number* (decimals) or *Integer* (no decimals).

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CMTaskEvent1</ElemCanocVal>
      <ElemCanocValDesc>Satisfaction Rating</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>UDList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCatCode</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>MaxLength</CanocValDetail>
          <CanocValTxt>60</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
          <CanocValTxt>6</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8096	Error	The <UserDefCode> is defined as a Date and <UserDefTxt> is not a date.
8097	Error	The <UserDefCode> is defined as an Integer and <UserDefTxt> is not a whole number.
8098	Error	UserDefTxt is invalid.
8099	Error	The <UserDefCode> is defined as Number and <UserDefTxt> is not a number.
8101	Error	UserDefTxt is required.
8125	Error	The max size has been exceeded for this element.
8128	Error	The element value provided is invalid.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the friendly text that appears in drop-down lists when the associated data type of the **UserDefCode** is *UDList*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode** which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is necessary to provide **UserDefCode** when the data type is *UDList*.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal** which indicates the user-defined field to associate the value with. It is necessary to provide **UserDefTxt** when the data type is *UDList*.
  - When **CanocValDetail** = *UDPresentationOrdinal*, `CanocValTxt` indicates the order the user-defined field should be displayed within a grouping on a sales event form.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Client</ElemCanocVal>
      <ElemCanocValDesc>Client</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>UserDefCode</CanocValDetail>
          <CanocValTxt>CMTaskEvent1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTxt</CanocValDetail>
          <CanocValTxt>268</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### PotSaleId (Optional)

This element indicates the potential sales opportunity that the sales event was created from.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

### CRMTerRsnDesc (Required in Certain Scenarios)

This element represents the reason that the event was terminated.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Error	<i>This element is not supported for this service.</i>
8161	Error	<i>The setting TerminationReasonRequired is set to True for the current Sales Event status.</i>

### WorkflowProcStat (Optional)

This element indicates whether the event should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### IncXtendElemArray (Optional)

This array is used to request additional, optional information pertaining to the service event.

#### IncXtendElemInfo

The `IncXtendElemInfo` complex element contains a single record indicating the additional optional information being requested.

## XtendElem

## XtendElem

This element represents the additional, optional information being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>

### Response

The service provider (Synapsys) returns the `CRMEventAdd` response message to the service consumer which contains the following simple elements.

## CRMEventId

This element represents the unique ID assigned to the event.

## RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Event Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventSrch

The CRM event search service returns all events for a particular `InstRtId`, based on specified filter criteria. The request provides the following optional filters:

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)

- **StartDate** (optional)
- **EndDate** (optional)
- **CRMEventType** (required)
- **EventOffCode**(optional)
- **EventStatCode**(optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Event Search Request

CRMEventSrchrq\_MType

The consumer sends the CRMEventSrchrq\_MType message containing the required CRMEventType and at least one of the optional search elements: AccountId, CustId, TaxId, StartDate, or EndDate.

## CRM Event Search Response

CRMEventSrchrRs\_MType

The service provider sends the CRMEventSrchrRs\_MType message containing an echo of the request, plus CRMEventSrchrArray.

## Request

The third-party consumer forwards the CRMEventSrchr request message to the service provider.

The element CRMEventType and at least one of the following additional elements contained within the CRMEventSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMEventSrchr service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8002	Warning	<i>The officer permission AllowViewIncentiveEvents is set to Non-</i>

Error Id	Category	Description
		<i>Automated.</i>
8003	Warning	<i>The officer permission AllowViewIncentiveEvents is set to None.</i>
8009	Warning	<i>No record(s) were found for the request received.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMEventType

This element indicates the type of event to be searched.

Canonical values are:

- *Sale* - Synapsys sales events
- *All* - Returns Synapsys services, sales, contact, and incentive events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8035	Error	<i>CRMEventType is required.</i>

## AccountId (Optional)

This complex element contains the following elements.

## AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>

## AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid**

attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### StartDt (Optional)

This optional element designates the starting point used for searching events based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available events that have an added date that is less than the specified **EndDt**.

### EndDt (Optional)

This optional element designates the ending point to use for searching events based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### EventOffCode (Optional)

This optional element aids in filtering events based on who they are currently referred to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional value is available.

- *CurUsr* - Filters events based on the officer that has been derived from the header sent along with the **CRMEventSrch** request.

### EventStatCode (Optional)

This element aids in filtering events based on their status. Valid status values may be sent.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional values are available:

- *Act* - Returns events that are not in a terminating status.
- *Esclt* - Returns events that have escalated.
- *ActEsclt* - Returns events that are not in a terminating status, that have escalated.

## Response

The service provider (Synapsys) returns the `CRMEventSrch` response message to the service consumer, which returns event records that meet the specified search criteria.

The following arrays are contained within the `CRMEventSrch` response message.

### CRMEventSrchArray

This element returns an array of responses for the event search and includes the `CRMEventSrchRec` complex element for each event record returned.

### CRMEventSrchRec

The `CRMEventSrchRec` complex element contains a package of data related to an event and includes the following simple elements.

### CRMEventType

This element indicates the type of event.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

### TaxId

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

**CustId**

This element represents the portfolio of the customer whom the event belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

**CRMEventId**

This element represents the unique ID assigned to the event.

**CRMEventDt**

This element represents the date that the event was created.

**EventCrtOffCode**

This element represents the code for the associate who created the event.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

**EventCrtOffDesc**

This element represents the name of the associate who created the event.

**EventOffCode**

This element represents the code for the associate whom the event is assigned to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

**EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

**EventCmnt**

This element represents any comments for the event.

**CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is

assigned to.

Canonical values are:

- *True*
- *False*

### **EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

### **EventDueDate**

This element indicates the date that the event is needed by.

### **EventStatCode**

This element represents the status code of the event.

### **EventStatDesc**

This element represents the descriptive text of the status of the event.

### **CRMEventDesc**

This element represents the summary for the event.

### **EscldDt**

This element represents the date that the event was escalated.

### **PersonName**

This complex element contains the following elements.

## **ComName**

# ComName

This element represents the customer's full name.

# FirstName

# FirstName

This element represents the customer's first name.

# LastName

# LastName

This element represents the customer's last name.

## CRM Event Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventInq

The CRM event inquiry service returns element details for a specific event. The event identification element **CRMEventId** and the event type **CRMEventType** are required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to event information.

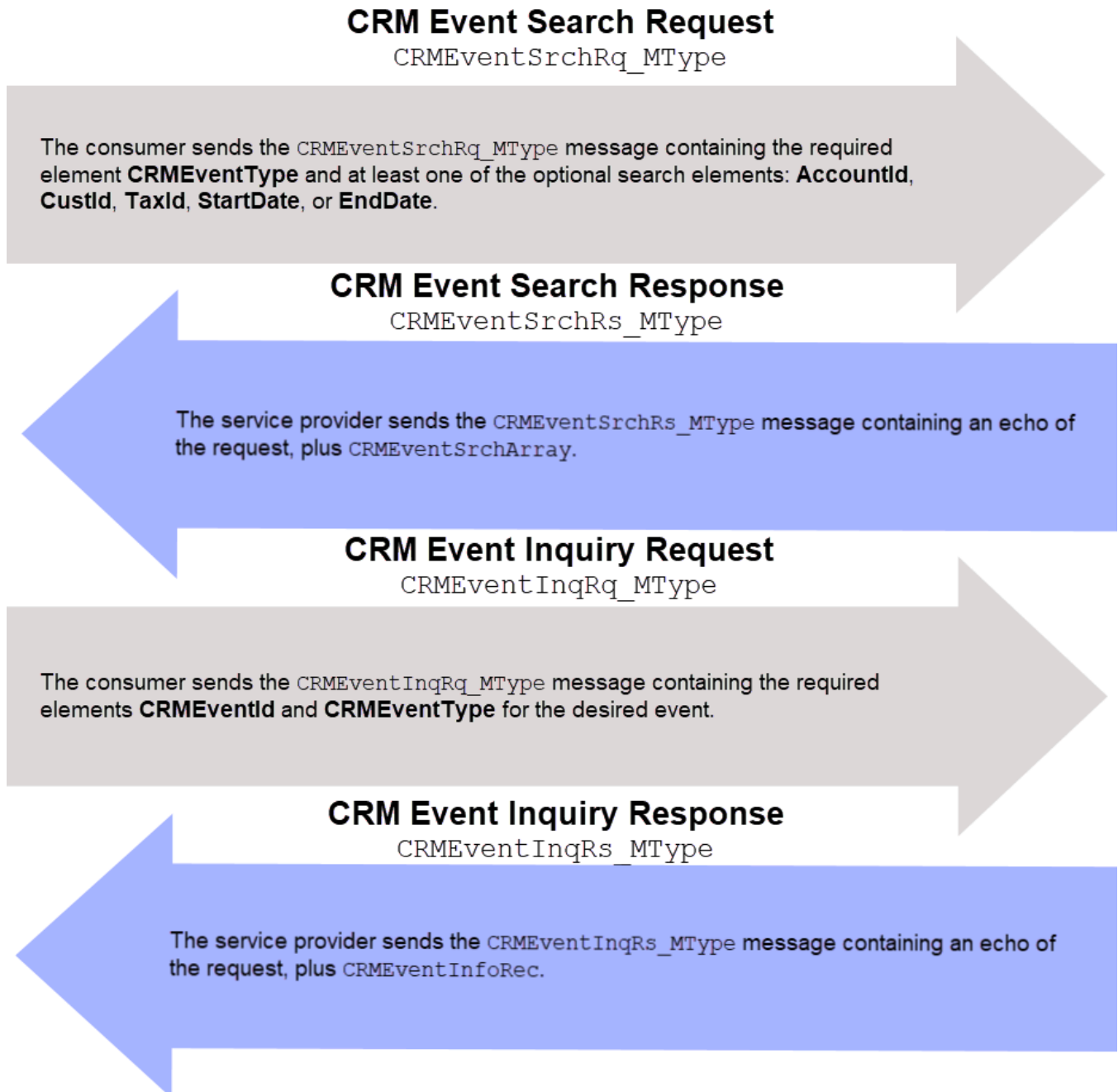
The event inquiry service uses a typical exchange of *Mtype* messages to retrieve profile information for a specific event, based on the event ID and type of event. If the event ID is not known, the consumer must first perform an event search to obtain the event ID for the desired event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the CRMEventInq request message to the service

provider.

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMEventInq` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### **CRMEventId (Required)**

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8030	Error	<i>CRMEventId is required.</i>

### **CRMEventType (Required)**

This element indicates the type of event to be searched.

The value `Sale` is sent to indicate that a sales event is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## IncXtendElemArray (Optional)

This array is used to request additional, optional information pertaining to the service event.

### IncXtendElemInfo

The `IncXtendElemInfo` complex element contains a single record indicating the additional optional information being requested.

## XtendElem

This element represents the additional, optional information being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>

## Response

The service provider (Synapsys) returns the `CRMEventInq` response message to the service consumer, which returns element details for a specific event based on the **CRMEventId** that was requested.

The arrays, simple, and complex elements contained within the `CRMEventInq` response applicable for Synapsys CRM Services are as follows.

## ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMEventInqRec

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

## CRMEventInfoRec

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

## CRMEventDt

This element represents the date that the event was created.

**CRMEventDesc**

This element represents the summary for the event.

**EventCrtOffCode**

This element represents the code for the associate who created the event.

**EventOffCode**

This element represents the code for the associate whom the event is assigned to.

**EventCmnt**

This element represents any comments for the event.

**CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

**EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

**EventDueDate**

This element indicates the date that the event is needed by.

## EventStatCode

This element represents the status code of the event.

## EventCatCode

This element represents the type of event.

## CRMOffArray

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

# CRMOffRec

# CRMOffRec

This element contains a collection of values for an associate affiliated with the event. It contains the following simple elements.

# CRMOffCodeText

# CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

# CRMOffCode

# CRMOffCode

This element represents the code of the associate that is affiliated with the event.

# CRMOffDesc

# CRMOffDesc

This element represents the name of the associate that is affiliated with the event.

## **UserDefInfoArray**

This array is a collection of additional information that is associated with the event and contains the complex `UserDefInfo` element.

# UserDefInfo

# UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

# UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

# UserDefCode

# UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

# UserDefDesc

# UserDefDesc

This element represents the description of the additional information that is related to the event.

## **PotSaleId**

This element represents the unique ID assigned to the Synapsys potential sale opportunity.

**EscltDt**

This element represents the date that the event was escalated.

**CRMTerRsnDesc**

This element represents the reason that the event was terminated.

**WorkflowProcStat**

This complex element indicates whether a record is under the control of a workflow process.

**CRMEventId**

This element represents the unique ID assigned to the event.

**CRMEventType**

This element indicates the type of event. The value *Sale* is always received when searching for sales events.

**CustId**

This element represents the portfolio of the customer whom the event belongs to.

**CRMRelCode**

This element represents the relcode1 of the customer that the event belongs to.

**TaxId**

This element represents the Social Security Number or tax ID of the customer or prospective customer that the event belongs to.

**EventCrtOffDesc**

This element represents the name of the associate who created the event.

## **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

## **EventStatDesc**

This element represents the descriptive text of the status of the event.

## **EventCatDesc**

This element represents the descriptive text of the category of the event.

## **x\_CRMRelActArray**

When requested, this array is used to return related activities pertaining to the sales event.

## **CRMRelActInfo**

This complex element contains a package of information about a single activity that is related to a sales event.

## **CRMActType**

This element represents the type of Synapsys activity being returned.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

## **CRMActId**

The **CRMActId** element represents the unique ID of the specific activity being returned.

## **CRMActDt**

This element represents the date that the activity was added.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **ActCrtStatDesc**

This element represents the descriptive value of the status that is associated with the activity.

### **CRMActRmk**

When **CRMActType** = *Meet*, this element represents the purpose of the meeting.

When **CRMActType** = *Msg*, this element represents the purpose of the mailing.

When **CRMActType** = *Phone*, this element represents the purpose of the phone call.

When **CRMActType** = *Note*, this element represents the text of the note.

### **x\_MktCmpgnInfoArray**

This array is used to request additional, optional information pertaining to the marketing campaign.

### **MktCmpgnInfoRec**

This complex element contains a collection of simple elements for a marketing campaign.

### **MktCmpgnID**

This element represents the unique ID of the specific marketing campaign being returned.

### **MktCmpgnType**

This element represents the type of marketing campaign.

### **MktCmpgnName**

This element is the name given to a marketing campaign.

### **MktCmpgnDesc**

This element is the description given to a marketing campaign.

### **MktCmpgnStartDt**

This element is the designated starting date for a marketing campaign.

### **MktCmpgnEndDt**

This element is the designated end date for a marketing campaign.

### **MktCmpgnExpDt**

This element is the expiration date set for a marketing campaign.

### **CRMProdArray**

This element is an array of product information for a marketing campaign.

## CRMProdInfoRec

## CRMProdInfoRec

This complex element contains simple elements to describe product information for a marketing campaign.

## CRMProdCode

## CRMProdCode

This element represents a specific type of product associated with a marketing campaign.

## CRMProdDesc

## CRMProdDesc

This element represents the descriptive name of the type of product associated with a marketing campaign.

# AcctType

## AcctType

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

# AcctTypeDesc

## AcctTypeDesc

This element represents the descriptive name of a valid deposit, loan, or additional service that is associated with the referral activity.

## CRM Event Modify

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventMod

The CRM event modify feature allows the service consumer to modify certain elements for a specific event. The **CRMEventId**, **ActIntentKey**, and **CRMEventType** elements are required on the modified request.

The event modification service uses a typical exchange of `MtType` messages to allow updates to the information for a specific event, based on the event ID. An event Inquiry must be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

## CRM Event Inquiry Request

`CRMEventInqRq_MType`

The consumer sends the `CRMEventInqRq_MType` message containing the required elements **CRMEventId** and **CRMEventType** for the desired event.

## CRM Event Inquiry Response

`CRMEventInqRs_MType`

The service provider sends the `CRMEventInqRs_MType` message containing an echo of the request, plus `CRMEventInfoRec`.

## CRM Event Mod Request

`CRMEventModRq_MType`

The consumer sends the `CRMEventModRq_MType` message containing the required **CRMEventId**, **CRMEventType**, and **ActIntentKey** elements. Additionally, both the `CRMEventInfoRec` complex element or **DIt** element must be included for the desired event.

## CRM Event Mod Response

`CRMEventModRs_MType`

The service provider sends the `CRMEventModRs_MType` message containing the response status **RsStat** indicating if the mod was successful. An unsuccessful mod request also returns the errors that prevented the mod.

## Request

The third-party consumer forwards the `CRMEventMod` request message to the service provider.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8196	Error	The officer permission AllowRelEx is set to False.
8201	Error	The officer does not have permission to view an event with this EventCatCode.

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMEventMod` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8152	Fault	The officer does not have sufficient privileges to edit.
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8119	Fault	Officer requesting does not have sufficient privileges to delete.

Error Id	Category	Description
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8138	Fault	A required user defined field was not supplied.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	The ErrCode is invalid.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8114</ElemCanocVal>
      <ElemCanocValDesc> The officer permission AllowViewPvtEvent is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8116</ElemCanocVal>
      <ElemCanocValDesc>CanReceiveServiceEvents = False for the officer this event is being
        assigned to.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMEventId (Required)

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8029	Error	<code>CRMEventId is invalid.</code>
8030	Error	<code>CRMEventId is required.</code>

### **CRMEventType (Required)**

This element indicates the type of event to be modified.

The value `sale` should indicate that a sale event is being modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<code>CRMEventType is invalid.</code>
8034	Error	<code>Incen is not yet supported by this service.</code>
8035	Error	<code>CRMEventType is required.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## Dlt (Optional)

This element represents the deletion of the specified event.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>

Error Id	Category	Description
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8222	Error	<i>When the sales event is part of a dynamic campaign it cannot be deleted.</i>

## RelActDlt (Optional)

This element indicates whether to delete any related Synapsys activities that may be associated with the event and is only considered when **Dlt** = *True*.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8080	Error	<i>RelActDlt is invalid.</i>
8187	Error	<i>Dlt must be true when RelActDlt = True.</i>

## CRMEventInfoRec (Required when Dlt = false, Optional when Dlt = true)

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>

Error Id	Category	Description
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>

### **CRMEventDesc (Optional)**

This element represents the summary for the event.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8184	Error	<i>The field is locked down on an event that is created from a PSO.</i>

### **EventOffCode (Optional)**

This element represents the code for the associate whom the event is assigned to. If not provided, the event is assigned to the user that is submitting the Synapsys CRM Service request.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8058	Error	<i>EventOffCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventCmnt (Optional)

This element represents any comments for the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

### CRMEventRecv (Optional)

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

When **UsePrivateEventFlag** is *False*, the **EventPrivType** is not supported. Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8059	Error	<i>EventPrivType is invalid.</i>

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8053	Warning	<i>This element is not supported for this service.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

When the system setting **UsePrivateEventFlag** is set to *false*, this element is not returned in the **SvcDictSrchRs**.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventDueDt (Optional)

This element indicates the date needed by for the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### **EventStatCode (Optional)**

This element represents the status code of the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8221	Error	<i>The campaign activity was generated as part of Dynamic Campaign and is currently in a status that cannot be edited.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *CRMTerRsnDescRequired*, **CanocValTxt** contains *true* or *false* indicating if **CRMTerRsnDesc** is required.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains numeric representation of the order in which the **EventStatCode** appears.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>CRMTerRsnDescRequired</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>CRMTerRsnDescRequired</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventCatCode (Optional)

This element represents the type of event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8184	Error	<i>The field is locked down on an event that is created from a PSO.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>
8221	Error	<i>The campaign activity was generated as part of Dynamic Campaign and is currently in a status that cannot be edited.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- When **CanocValDetail** = *PublishCreate*, **CanocValTxt** contains *true* or *false* indicating if **Create** is configured for the 750 - Sales Event for Enterprise Event System

(EES).

- When **CanocValDetail** = *PublishUpdate*, **CanocValTxt** contains *true* or *false* indicating if **Update** is configured for the 750 - Sales Event for Enterprise Event System (EES).
- When **CanocValDetail** = *PublishDelete*, **CanocValTxt** contains *true* or *false* indicating if **Delete** is configured for the 750 - Sales Event for Enterprise Event System (EES).

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>Commercial Lending</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>EventOffCodeDft</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>999</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>SalesEventTypeUsage</CanocValDetail>
          <CanocValTxt>Both</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishCreate</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishUpdate</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PublishDelete</CanocValDetail>
          <CanocValTxt>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMOffArray (Optional)

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>

### **CRMOffRec**

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

## CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

Passing **JHANull** = *True* on this element has no effect.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8039	Error	<i>CRMOffCode is required.</i>
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.

- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- **CanocValInfoArray** contains all the possible officers available for the value specified in **ElemCanocVal**.
  - **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
  - **CanocValText** represents name of the associate represented in **CanocValDetail**.

**CAUTION**

When **EventPrivType** is changed to *True*, the values for **EventOffCode** and **EventOffCodeText** can be retrieved again using the Service Dictionary Search with the **EventPrivType** filter.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended for the
    SecondaryAssoc1 field.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>CC</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended as a cc
    officer.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMOffCode

# CRMOffCode

This element represents the code of the associate that is affiliated with the event.

Passing **JHANull** = *True* on this element causes the fields being referenced **CRMOffCodeText** to be cleared.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

## UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>

## UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

Passing **JHANull** = *True* on this element has no effect.

This element allows for a maximum of 60 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8096	Error	<i>The &lt;UserDefCode&gt; is defined as a Date and &lt;UserDefTxt&gt; is not a date.</i>
8097	Error	<i>The &lt;UserDefCode&gt; is defined as an Integer and &lt;UserDefTxt&gt; is not a whole number.</i>
8099	Error	<i>The &lt;UserDefCode&gt; is defined as Number and &lt;UserDefTxt&gt; is not a number.</i>
8101	Error	<i>UserDefTxt is required.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8152	Fault	<i>The officer does not have sufficient privileges to edit.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the friendly text that appears in drop-down lists when the associated data type of the **UserDefCode** is *UDList*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode** which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is always necessary to provide **UserDefCode** for every user-defined field that is being modified.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal** which indicates the user-defined field to associate the value with. It is always necessary to provide **UserDefText** for every user-defined field that is being modified.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** indicates the order the value should appear in the drop-down menu on the form and is only provided when the data type is **UDList**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Client</ElemCanocVal>
      <ElemCanocValDesc>Client</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>UserDefCode</CanocValDetail>
          <CanocValTxt>CMTaskEvent1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTxt</CanocValDetail>
          <CanocValTxt>268</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

Passing **JHANull** = *True* on this element causes the field being referenced in **UserDefCode** to be blanked out.

The following errors, warnings, or faults may occur with **UserDefCode**.

Error Id	Category	Description
8089	Error	<b>UserDefCode</b> is invalid.
8090	Error	<b>UserDefCode</b> is required.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **UserDefCode**.
- **ElemCanocValDesc** represents the friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values are *UDList*, *Text*, *Date*, *Number* (decimals), and *Integer* (no decimals).
  - When **CanocValDetail** = *IsRequired*, **CanocValTxt** indicates if the user-defined field returned in **ElemCanocVal** is required or not.
  - When **CanocValDetail** = *EventCatCode*, **CanocValTxt** indicates if the **EventCatCode** user-defined field returned in **ElemCanocVal** is associated with.
  - When **CanocValDetail** = *MaxLength*, **CanocValTxt** indicates the max length allowed for the user-defined field returned in **ElemCanocVal**. Only pertains when the data type is not *UDList*.
  - When **CanocValDetail** = *UDPresentationOrdinal*, **CanocValTxt** indicates the maximum number length allowed for the user-defined field returned in **ElemCanocVal**. Only pertains when the datatype is not *UDList*.

```

SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>CMTaskEvent1</ElemCanocVal>
    <ElemCanocValDesc>Satisfaction Rating</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>DataType</CanocValDetail>
        <CanocValTxt>UDList</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsRequired</CanocValDetail>
        <CanocValTxt>True</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCatCode</CanocValDetail>
        <CanocValTxt>1</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>MaxLength</CanocValDetail>
        <CanocValTxt>60</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
        <CanocValTxt>6</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
<SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## CRMTrRsnDesc (Required in Certain Scenarios)

This element represents the reason that the event was terminated.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Error	<i>This element is not supported for this service.</i>
8161	Error	<i>The setting TerminationReasonRequired is set to True for the current Sales Event status.</i>

## WorkflowProcStat (Optional)

This element indicates whether the event should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMEventMod` response message to the service consumer which contains the following simple elements.

## RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Service Events Services

Synapsys has messaging services for the addition, search, inquiry, and modification of service events information on service providers.

### CRM Event Add

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventAdd

The CRM event add service allows the service consumer to add a contact, incentive, sales, or service event into the Synapsys database. The consumer must provide the following:

- A valid **CRMEventType**
- A unique customer identified by providing the following elements:

- **CustId**
- **CRMRelCode**
- **TaxId**

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

- Any required elements that are part of the `CRMEventInfoRec` complex element for the event.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

### CRM Event Add Request

`CRMEventAddRq_MType`

The consumer sends the `CRMEventAddRq_MType` message containing the required element and a unique customer or prospect identified by **CustId**, **CRMRelCode**, or **TaxId** as well as any required elements that are part of the `CRMEventInfoRec` complex element for the type of event that is being added.

### CRM Event Add Response

`CRMEventAddRs_MType`

The service provider sends the `CRMEventAddRs_MType` message containing an echo of the request plus the response status **RsStat** indicating if the add was successful. If the add was successful, the **EventId** assigned to the new event is also returned. An unsuccessful add request returns the errors that prevented the add.

## Request

The third-party consumer forwards the `CRMEventAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMEventAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8054	Error	<i>The financial institution has chosen not to enable Service Events.</i>
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### ErrOvrRd

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

#### ErrCode

This element represents a valid error code that pertains to the specific **CRMEventType** being requested for the `CRMEventAdd` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8116	Fault	<i>CanReceiveServiceEvents = False for the officer this event is being assigned to.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8107	Fault	The officer permission <b>AllowActivitiesCreate</b> is set to <i>False</i> .

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8116</ElemCanocVal>
      <ElemCanocValDesc>CanReceiveServiceEvents = False for the officer this event is being
        assigned to.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  .
  .
  .
</SvcDictInfoRec>

```

## CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>

## CustId

This element represents a valid Client or Additional Service Only client portfolio within the Synapsys database. For Symitar only, it may represent the MBR number.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys</i>

Error ID	Category	Description
		<code>database.</code>

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<code>The elements provided did not result in a valid or unique client in the Synapsys database.</code>

## CRMEventType (Required)

This element indicates the type of event to be added.

The value `SVC` is sent to indicate a service event is added.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8033	Error	<code>CRMEventType is invalid.</code>
8034	Error	<code>Incen is not yet supported by this service.</code>
8035	Error	<code>CRMEventType is required.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMEventInfoRec (Required)

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>

## CRMEventDesc (Optional)

This element represents the summary for the event.

For service events, when **CRMEventDesc** is not provided, the summary defaults to the text of the **Parent Category** and **Category** that were selected.

This element allows for a maximum of 100 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this</i>

Error ID	Category	Description
		<code>element.</code>

### EventOffCode (Optional)

This element represents the code for the associate whom the event is assigned to.

#### NOTE

If the associate is not entitled to view the service event category, the associate is not available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

If not provided when **CRMEventType** = *Svc*, the event is assigned to the default officer assigned with the service event category (**EventCatCode**). Otherwise, the event is assigned to the user who is submitting the Synapsys CRM service request.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8058	Error	<code>EventOffCode is invalid.</code>
8070	Error	<code>Event or Activity cannot be a terminating status when assigned to a Queue.</code>
8114	Fault	<code>The officer permission AllowViewPvtEvent is set to False.</code>
8116	Fault	<code>CanReceiveServiceEvents = False for the officer this event is being assigned to.</code>
8201	Error	<code>The officer does not have permission to view an event with this EventCatCode.</code>

When the **EventCatCode** filter is provided in the Service Dictionary, this means Synapsys only returns a single category. When that happens, Synapsys can return the defaults for the category. Otherwise, the user must obtain it from the **EventCatCode** information that is returned.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the

Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The **CanocValInfoArray** contains the following additional information.
  - When **CanocValDetail** = *IsQueueOfficer*, **CanocValTxt** contains *true* or *false*, indicating if the officer represented in **ElemCanocVal** is a queue officer.
  - When **CanocValDetail** = *AllowViewPvtEvent*, **CanocValTxt** contains *true* or *false* indicating if the officer represented in **ElemCanocVal** has permissions to view private events.

**NOTE**

If the **CanocValDetail** = *IsQueueOfficer* and the **CanocValTxt** = *True*, terminating statuses should not be displayed. Use the **AllowViewPvtEvents** filter to return a list of associates who have permission to view private events.

```
</SvcDictInfoRec>
...
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SAT</ElemCanocVal>
    <ElemCanocValDesc>Sally A ██████ </ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>IsQueueOfficer</CanocValDetail>
        <CanocValTxt>False</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
        <CanocValTxt>True</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>QDEP</ElemCanocVal>
    <ElemCanocValDesc>Queue Deposits</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>IsQueueOfficer</CanocValDetail>
        <CanocValTxt>True</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>AllowViewPvtEvent</CanocValDetail>
        <CanocValTxt>False</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
...
</SvcDictInfoRec>
```

### EventCmnt (Optional)

This element represents any comments for the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8126	Error	<i>Comments are not visible for this Event or Activity.</i>

### CRMEventRecv (Optional)

This element indicates whether the event is marked read by the associate that it is assigned to.

#### NOTE

When a terminating status is sent, the event is marked as read.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8059	Error	<i>EventPrivType is invalid.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- `ElemCanocVal` and `ElemCanocValDesc` represent the value to be sent in **EventPrivType**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### EventDueDt (Optional)

This element indicates the date needed by for the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>

### EventStatCode (Required in Certain Scenarios)

This element represents the status code of the event.

**EventStatCode** is not required when **CRMEventType** = *svc* and there is a default status associated with the **EventCatCode** that is sent.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>
8061	Error	<i>EventStatCode is required.</i>

Error ID	Category	Description
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8157	Error	<i>The officer does not have sufficient privileges to set the Event or Activity to a terminating status.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *Is Terminating*, **CanocValTxt** contains *true* or *false* indicating if the status represented in **ElemCanocVal** is a terminating status or not.

#### CAUTION

When the **EventStatCode** is a terminating status, **UserDefCode** is required if it is identified as required when the status is set to a terminating status. See *UserDefCode* for additional information.

#### CAUTION

When `EventOffCode` is changed, the values for **EventStatCode** are retrieved again using the **SvcDictSrch** with the **EventOffCode** filter.

#### NOTE

When a terminating status is sent, the event is marked as read.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>389</ElemCanocVal>
      <ElemCanocValDesc>New Event</ElemCanocValDesc>
      <CanocValInfo>
        <CanocValDetail>IsTerminating</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventCatCode (Required)

This element represents the category of event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8056	Error	<i>EventCatCode is required.</i>
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>
8204	Error	<i>The incorrect EventCatCode was provided for the LobbyQueId value provided.</i>

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `ParentCategory`, **CanocValTxt** contains the friendly name of the parent category grouping that the category appears in.
  - When **CanocValDetail** = `ParentCategoryDescription`, **CanocValTxt** additional helpful information about the parent category. As a consumer you can choose to display this in a tooltip.
  - When **CanocValDetail** = `ParentCategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the parent category is displayed in.
  - When **CanocValDetail** = `CategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the category displays in within a parent category grouping.
  - When **CanocValDetail** = `VisibleInDesktop`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys CRM Desktop application.
  - When **CanocValDetail** = `VisibleInCallCenter`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys plugin displayed in the jhaCC application.
  - When **CanocValDetail** = `VisibleInLobbyTracking`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys Lobby Tracking application.
  - When **CanocValDetail** = `EventStatCodeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category.
  - When **CanocValDetail** = `EventStatCodeAssignToMeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category when performing the **Assign To Me** option.
  - When **CanocValDetail** = `EventOffCodeDefault`, **CanocValTxt** contains the default officer code for the category.
  - When **CanocValDetail** = `ParentCategoryVisibleInDesktop`, **CanocValTxt** contains `true` or `false` indicating if the parent category is intended to be available for use in the Synapsys CRM Desktop application.
  - When **CanocValDetail** = `ParentCategoryVisibleInCallCenter`, **CanocValTxt** contains `true` or `false` indicating if the parent category is intended to be available for use in the Synapsys plugin displayed in the jhaCC application.
  - When **CanocValDetail** = `ParentCategoryVisibleInLobbyTracking`, **CanocValTxt** contains `true` or `false` indicating if the parent category is intended to be available for use in the Synapsys Lobby Tracking application.

- When **CanocValDetail** = *PublishCreate*, **CanocValTxt** contains `true` or `false` indicating if **Create** is enabled for the 750 - Service Event for Enterprise Event System (EES).
- When **CanocValDetail** = *PublishUpdate*, **CanocValTxt** contains `true` or `false` indicating if **Update** is enabled for the 750 - Service Event for Enterprise Event System (EES).
- When **CanocValDetail** = *PublishDelete*, **CanocValTxt** contains `true` or `false` indicating if **Delete** is enabled for the 750 - Service Event for Enterprise Event System (EES).

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>7</ElemCanocVal>
    <ElemCanocValDesc>Refund Type</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>ParentCategory</CanocValDetail>
        <CanocValTxt>Common</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryDescription</CanocValDetail>
        <CanocValTxt>Comment parent category</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>38</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>18</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInDesktop</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInCallCenter</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInDesktop</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInCallCenter</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeDefault</CanocValDetail>
        <CanocValTxt>28</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeAssignToMeDefault</CanocValDetail>
        <CanocValTxt>38</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventOffCodeDefault</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishCreate</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishUpdate</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishDelete</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMOffArray (Optional)

This array is a collection of associates that are associated with the event and contains the complex CRMOffRec element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText

# CRMOffCodeText

The **CRMOffCodeText** element represents the affiliation the **CRMOffCode** has with the event.

### NOTE

If the associate is not entitled to view the service event category, the associate is not available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

Canonical values are:

- *SecondaryAssoc*
- *CC*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- `CanocValInfoArray` contains all the possible officers available for the value specified in `ElemCanocVal`.
  - **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
  - **CanocValText** represents the name of the associate represented in **CanocValDetail**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended for the
      SecondaryAssoc1 field.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>CC</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended as a cc
      officer.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████ </CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8116	Fault	<i>CanReceiveServiceEvents = False for the officer this event is being assigned to.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### **CRMAcctArray (Optional)**

This array is a collection of accounts that are associated with the event. It contains the complex `CRMAcctInfoRec` element.

#### **CRMAcctInfoRec**

`CRMAcctInfoRec` contains a collection of simple elements. If any records exist within the array, the simple elements must be provided.

## AcctId (Optional)

## AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	The element value provided is invalid.
8129	Error	This element is required.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When `CanocValDetail = AcctTypeDescription`, `CanocValTxt` contains the friendly description of the value stored in `ElemCanocValDesc`.
  - When `CanocValDetail = CRMProdCodeDescription`, `CanocValTxt` contains an additional friendly description further describing the value stored in `ElemCanocVal`.
  - When `CanocValDetail = Status`, `CanocValTxt` contains the status associated with the value stored in `ElemCanocVal`.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>1</ElemCanocVal>
        <ElemCanocValDesc>4</ElemCanocValDesc>
        <CanocValInfoArray>
          <CanocValInfo>
            <CanocValDetail>AcctTypeDescription</CanocValDetail>
            <CanocValTxt>Deposit</CanocValTxt>
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>CRMProdCodeDescription</CanocValDetail>
            <CanocValTxt>Free Checking</CanocValTxt>
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>Status</CanocValDetail>
            <CanocValTxt>A</CanocValTxt>
          </CanocValInfo>
        </CanocValInfoArray>
      </ElemCanocRec>
    </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## AcctType (Required)

# AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

Valid values for **AcctType** are obtained in `SvcDictInfoArray` of the Service Dictionary Search response for the **AcctId** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8129	Error	<i>CRMAcctType is required.</i>

## UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>
8189	Error	<i>The value(s) provided in the UserDefInfoArray combined with what is stored in the database (only existing events) is invalid due to configured dependencies.</i>

When you use conditionally displayed fields, the whole array must be valid based on how the fields are set up. If they are not, you receive error 8138.

For example, consider the conditionally displayed field **Have Children?**

Category: Conditionally Displayed Test

Rendered View **Data View** Terminating Officers Statuses Entitlements

+ Add Group + Add Detail Entry

Standard Event Fields	Conditionally Displayed
Summary: <span style="float: right;">Text</span>	Have Children? * <input type="text" value="No"/>
Assigned To: *	
Status: * <input type="text" value="Active"/>	
Needed By: <input type="text" value="//"/>	

If you try to add a service event with **Have Children?** = *No* and **How Many?** = *1*, then you receive error 8138. **How Many?** does not appear unless **Have Children?** = *Yes*.

Category: Conditionally Displayed Test

Rendered View **Data View** Terminating Officers Statuses Entitlements

+ Add Group + Add Detail Entry

Standard Event Fields	Conditionally Displayed
Summary: <span style="float: right;">Text</span>	Have Children? * <input type="text" value="Yes"/>
Assigned To: *	How Many? * <input type="text"/>
Status: * <input type="text" value="Active"/>	
Needed By: <input type="text" value="//"/>	

## UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefCode

# UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8089	Error	<code>UserDefCode is invalid.</code>
8090	Error	<code>UserDefCode is required.</code>
8203	Error	<code>The UserDefCode provided is configured to be conditionally displayed, and the trigger field (UserDefCode) and value (UserDefText) have not been provided or are not stored in the database.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `DataType`, **CanocValTxt** contains the data types associated with the user-defined field stored in **ElemCanocVal**. Possible values are: `UDList`, `Text`, `Date`, `Number` (decimals), `Integer` (no decimals), `Officer`, `Branch`, `Application`, or `ClientAccount`.
  - When **CanocValDetail** = `IsRequired`, **CanocValTxt** contains `true` or `false` to indicate if the user-defined field returned in **ElemCanocVal** is required or not.
  - When **CanocValDetail** = `EventCatCode`, **CanocValTxt** indicates if the **EventCatCode** the user-defined field returned in **ElemCanocVal** is associated with the event.
  - When **CanocValDetail** = `UDGroupName`, **CanocValTxt** indicates the grouping the user-defined field returned in **ElemCanocVal** is associated with on an event form.
  - When **CanocValDetail** = `UDGroupNamePresentationOrdinal`, **CanocValTxt** indicates the order the group should appear on a service event form.
  - When **CanocValDetail** = `UDPresentationOrdinal`, **CanocValTxt** indicates the order the user-defined field should appear within a grouping on a service event form.
  - When **CanocValDetail** = `RequireAtTermination`, **CanocValTxt** contains `True` or `False` to indicate if the user-defined field returned in `ElemCanocVal` is required when **EventStatCode** is a terminating status.

**CAUTION**

When the **UserDefCode** has **RequireAtTermination** = `True` and **ReferStatCode** is a

terminating status, **UserDefCode** is required. See **ReferStatCode** for additional information.

- When **CanocValDetail** = *DataLength*, **CanocValTxt** contains a numeric value indicating the max datalength allowed. This value is only returned when **DataType** = *Text*, *Number* (decimals) or *Integer* (no decimals).
- When **CanocValDetail** = *ConditionallyDisplayedByUserDefCode*, **CanocValTxt** indicates whether the conditionally displayed fields appear or not based on your answer to the initial question.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1</ElemCanocVal>
      <ElemCanocValDesc>How satisfied are you?</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>UDList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCatCode</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupName</CanocValDetail>
          <CanocValTxt>Demographics</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RequireAtTermination</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </SvcPrvdInfo></SvcPrvdInfo>
```

```

</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>2</ElemCanocVal>
  <ElemCanocValDesc>Description</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Text</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>>true</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>DataLength</CanocValDetail>
      <CanocValTxt>100</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>3</ElemCanocVal>
  <ElemCanocValDesc>Choose the Client Account</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>ClientAccount</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Accounts</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>

```

```

<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>4</ElemCanocVal>
  <ElemCanocValDesc>Choose the Officer</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Officer</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>TMZ</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>3</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>4</ElemCanocVal>
  <ElemCanocValDesc>Choose the Officer</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Officer</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>IsRequired</CanocValDetail>
  <CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>EventCatCode</CanocValDetail>
  <CanocValTxt>1</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTxt</CanocValDetail>
  <CanocValTxt>TMZ</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UDGroupName</CanocValDetail>
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<CanocValInfo>
  <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
  <CanocValTxt>1</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
  <CanocValTxt>3</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
  <CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>5</ElemCanocVal>
  <ElemCanocValDesc>Choose the Application</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Application</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Accounts</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>

```

```

    <CanocValTxt>2</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
  <CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>6</ElemCanocVal>
  <ElemCanocValDesc>Choose the Branch</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Branch</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>7</ElemCanocVal>

```

```

<ElemCanocValDesc>Do you have children?</ElemCanocValDesc>
<CanocValInfoArray>
  <CanocValInfo>
    <CanocValDetail>DataType</CanocValDetail>
    <CanocValTxt>UDList</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>IsRequired</CanocValDetail>
    <CanocValTxt>>false</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>EventCatCode</CanocValDetail>
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  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDGroupName</CanocValDetail>
    <CanocValTxt>Children</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
    <CanocValTxt>1</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
    <CanocValTxt>2</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>RequireAtTermination</CanocValDetail>
    <CanocValTxt>>false</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>8</ElemCanocVal>

```

```

<ElemCanocValDesc>Number of Children?</ElemCanocValDesc>
<CanocValInfoArray>
  <CanocValInfo>
    <CanocValDetail>DataType</CanocValDetail>
    <CanocValTxt>Text</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>IsRequired</CanocValDetail>
    <CanocValTxt>>true</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>EventCatCode</CanocValDetail>
    <CanocValTxt>1</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDGroupName</CanocValDetail>
    <CanocValTxt>Children</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
    <CanocValTxt>1</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
    <CanocValTxt>2</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>RequireAtTermination</CanocValDetail>
    <CanocValTxt>>false</CanocValTxt>
  </CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
    <CanocValTxt>7</CanocValTxt>
  </CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
</ElemCanocArray>
</SvcDictInfoRec>

```

## UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

### NOTE

If the associate is not entitled to view the service event category, the associate is not available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

When the **Detail** entry is defined as a number, this element allows for maximum of 38 characters.

When the **Detail** entry is defined as an integer, this element allows for a maximum of 10 characters.

When the **Detail** entry is defined as text, this element allows for a maximum of 7,500 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8093	Error	<i>The &lt;UserDefCode&gt; is defined as Application and &lt;UserDefTxt&gt; is not a valid application.</i>
8094	Error	<i>The &lt;UserDefCode&gt; is defined as Branch and &lt;UserDefTxt&gt; is not a valid branch.</i>
8095	Error	<i>The &lt;UserDefCode&gt; is defined as ClientAccount and &lt;UserDefTxt&gt; is not a valid account for the client.</i>
8096	Error	<i>The &lt;UserDefCode&gt; is defined as a Date and &lt;UserDefTxt&gt; is not a date.</i>
8097	Error	<i>The &lt;UserDefCode&gt; is defined as an Integer and &lt;UserDefTxt&gt; is not a whole number.</i>
8099	Error	<i>The &lt;UserDefCode&gt; is defined as Number and &lt;UserDefTxt&gt; is not a number.</i>
8100	Error	<i>The &lt;UserDefCode&gt; is defined as Officer and &lt;UserDefTxt&gt; is not a valid officer.</i>
8101	Error	<i>UserDefTxt is required.</i>
8102	Error	<i>The &lt;UserDefCode&gt; is defined as UDList and &lt;UserDefTxt&gt; is not a valid list value.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the friendly text that appears in drop-

down lists when the associated data type of the **UserDefCode** is one of the following: *UDList, Officer, Branch, Application, or ClientAccount*.

- The **CanocValInfoArray** contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode** which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is necessary to provide **UserDefCode** for the following data types: *UDList, Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal** which indicates the user-defined field to associate the value with. It is necessary to provide **UserDefTxt** for the following data types: *UDList, Officer, Branch, Application, or ClientAccount*.
  - When **CanocValDetail** = *IsDefaultSelection*, **CanocValTxt** contains *true* or *false* to indicate if the value provided in **ElemCanocVal** is the default selection when the data type is *UDList*.
  - When **CanocValDetail** = *UserDefCodeDependency*, **CanocValTxt** contains the code of the **Parent Detail Entry Id** to indicate if this field depends on a parent field.
  - When **CanocValDetail** = *UserDefTextDependency*, **CanocValTxt** contains the code of the **Parent Detail Entry Id** to indicate if this field is dependent on a parent field.
  - When **CanocValDetail** = *UserDefInfo1*, **CanocValTxt** contains the unique value that indicates the type of account that was returned in **ElemCanocVal**. It is only necessary to provide **UserDefCode1** when the data type is *ClientAccount*.
  - When **CanocValDetail** = *UserDefInfo2*, **CanocValTxt** contains the unique value that further indicates the type of account that was returned in **ElemCanocVal**. It is only necessary to provide **UserDefCode2** when the data type is *ClientAccount*.
  - When **CanocValDetail** = *ConditionallyDisplayedByUserDefCode*, **CanocValTxt** indicates whether the conditionally displayed fields appear or not based on your answer to the initial question.

**NOTE**

There may be multiple values.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SD</ElemCanocVal>
      <ElemCanocValDesc>SD</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>UserDefCode</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTxt</CanocValDetail>
          <CanocValTxt>10</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsDefaultSelection</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefCodeDependency</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTextDependency</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sioux Falls</ElemCanocVal>
      <ElemCanocValDesc>Sioux Falls</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>UserDefCode</CanocValDetail>

```

```

    <CanocValTxt>12</CanocValTxt>
  </CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTxt</CanocValDetail>
  <CanocValTxt>28</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>IsDefaultSelection</CanocValDetail>
  <CanocValTxt>True</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefCodeDependency</CanocValDetail>
  <CanocValTxt>1</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTextDependency</CanocValDetail>
  <CanocValTxt>18</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>██████ - CheckingMoney/Market (COMMON SENSE CKG)</ElemCanocVal>
  <ElemCanocValDesc>██████ - CheckingMoney/Market (COMMON SENSE CKG)</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>██████</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefInfo1</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefInfo2</CanocValDetail>
  <CanocValTxt>35</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>30 - ██████████ Branch</ElemCanocVal>
  <ElemCanocValDesc>30 - ██████████ Branch</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>6</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>30</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>██████████</ElemCanocVal>
  <ElemCanocValDesc>██████████</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>4</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>██████████</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <CanocValInfo>

```

```

    <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElenCanocVal>Deposits</ElenCanocVal>
  <ElenCanocValDesc>Deposits</ElenCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>5</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElenCanocVal>Yes</ElenCanocVal>
  <ElenCanocValDesc>Yes</ElenCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>7</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>20</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsDefaultSelection</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefCodeDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTextDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt>8</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>No</ElemCanocVal>
  <ElemCanocValDesc>No</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>7</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>21</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsDefaultSelection</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefCodeDependency</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTextDependency</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## UserDefInfo1

## UserDefInfo1

This element represents code that is associated with the product code family (e.g., savings, checking, etc.) that is associated with the account number provided in **UserDefTxt**.

When the datatype is specified as *ClientAccount* for **UserDefCode**, **UserDefInfo1** is required.

Valid values for **UserDefInfo1** are obtained in *SvcDictInfoArray* of Service Dictionary Search response for the **UserDefTxt** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8129	Fault	<i>This element is required.</i>

## UserDefInfo2

## UserDefInfo2

This element represents a specific type of deposit, loan, or additional service associated with the account number provided in **UserDefTxt**.

When the datatype is specified as *ClientAccount* for **UserDefCode**, **UserDefInfo2** is required. Valid values for **UserDefInfo2** are obtained in *SvcDictInfoArray* of the Service Dictionary Search response for the **UserDefTxt** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8129	Fault	<i>This element is required.</i>

### **WorkflowProcStat**

This element indicates whether the event should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

The following partial XML example shows what is returned in the *SvcDictInfoArray* of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## LobbyQueld (Optional)

This element represents a unique record in the LobbyQueue table.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMEventAdd` response message to the service consumer which contains the following simple elements.

### EventCatCode

This element represents the category of event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8056	Error	<i>EventCatCode is required.</i>

Error ID	Category	Description
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>
8204	Error	<i>The incorrect EventCatCode was provided for the LobbyQueId value provided.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `ParentCategory`, **CanocValTxt** contains the friendly name of the parent category grouping that the category appears in.
  - When **CanocValDetail** = `ParentCategoryDescription`, **CanocValTxt** additional helpful information about the parent category. As a consumer you can choose to display this in a tooltip.
  - When **CanocValDetail** = `ParentCategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the parent category appears.
  - When **CanocValDetail** = `CategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the category displays in within a parent category grouping.
  - When **CanocValDetail** = `VisibleInDesktop`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys CRM Desktop application.
  - When **CanocValDetail** = `VisibleInCallCenter`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys plug-in displayed in the jhaCC application.
  - When **CanocValDetail** = `VisibleInLobbyTracking`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys Lobby Tracking application.
  - When **CanocValDetail** = `EventStatCodeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category.
  - When **CanocValDetail** = `EventStatCodeAssignToMeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category when performing the **Assign To Me** option.

- When **CanocValDetail** = *EventOffCodeDefault*, **CanocValTxt** contains the default officer code for the category.
- When **CanocValDetail** = *ParentCategoryVisibleInDesktop*, **CanocValTxt** contains *true* or *false* indicating if the parent category is intended to be available for use in the Synapsys CRM Desktop application.
- When **CanocValDetail** = *ParentCategoryVisibleInCallCenter*, **CanocValTxt** contains *true* or *false* indicating if the parent category is intended to be available for use in the Synapsys plug-in displayed in the jhaCC application.
- When **CanocValDetail** = *ParentCategoryVisibleInLobbyTracking*, **CanocValTxt** contains *true* or *false* indicating if the parent category is intended to be available for use in the Synapsys Lobby Tracking application.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>7</ElemCanocVal>
    <ElemCanocValDesc>Refund Type</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>ParentCategory</CanocValDetail>
        <CanocValTxt>Common</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryDescription</CanocValDetail>
        <CanocValTxt>Comment parent category</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>30</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>10</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInDesktop</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInCallCenter</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInDesktop</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInCallCenter</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeDefault</CanocValDetail>
        <CanocValTxt>20</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeAssignToMeDefault</CanocValDetail>
        <CanocValTxt>30</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventOffCodeDefault</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishCreate</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishUpdate</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishDelete</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMEventId

This element represents the unique ID assigned to the event.

## RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Event Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventSrch

The CRM event search service returns all events for a particular `InstRtId`, based on specified filter criteria. The request provides the following optional filters:

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)

- **StartDate** (optional)
- **EndDate** (optional)
- **CRMEventType** (required)
- **EventOffCode**(optional)
- **EventStatCode**(optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Event Search Request

CRMEventSrchrq\_MType

The consumer sends the CRMEventSrchrq\_MType message containing the required **CRMEventType** and at least one of the optional search elements: **Accountid**, **Custid**, **Taxid**, **StartDate**, or **EndDate**.

## CRM Event Search Response

CRMEventSrchrS\_MType

The service provider sends the CRMEventSrchrS\_MType message containing an echo of the request, plus CRMEventSrchrArray.

## Request

The third-party consumer forwards the CRMEventSrchr request message to the service provider.

The element **CRMEventType** and at least one of the additional listed elements contained within the CRMEventSrchr request message are necessary for Synapsys CRM services.

The following general errors or warnings occur with the CRMEventSrchr service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8002	Warning	<i>The officer permission AllowViewIncentiveEvents is set to Non-</i>

Error Id	Category	Description
		<i>Automated.</i>
8003	Warning	<i>The officer permission AllowViewIncentiveEvents is set to None.</i>
8009	Warning	<i>No record(s) were found for the request received.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMEventType

This element indicates the type of event to be searched.

Canonical values are:

- *Svc* - Synapsys service events
- *All* - Returns Synapsys service, sales, contact, and incentive events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8035	Error	<i>CRMEventType is required.</i>

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>

### AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid**

attribute is supported.

### **StartDt (Optional)**

This optional element designates the starting point used for searching events based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available events that have an added date that is less than the specified **EndDt**.

### **EndDt (Optional)**

This optional element designates the ending point to use for searching events based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### **EventOffCode (Optional)**

This optional element aids in filtering events based on who they are currently referred to.

This element supports the *Exact*, *Contains*, *StartsWith*, and *EndsWith* search attributes, with *Exact* being the default.

The following additional value is available.

- *CurUsr* - Filters events based on the officer that has been derived from the header sent along with the **CRMEventSrch** request.

### **EventStatCode (Optional)**

This element aids in filtering events based on their status. Valid status values may be sent.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional values are available:

- *Act* - Returns events that are not in a terminating status.
- *Esclt* - Returns events that have escalated.
- *ActEsclt* - Returns events that are not in a terminating status, that have escalated.

## Response

The service provider (Synapsys) returns the `CRMEventSrch` response message to the service consumer, which returns a list of event records that meet the specified search criteria.

The arrays contained within the `CRMEventSrch` response message are.

### CRMEventSrchArray

This element returns an array of responses for the event search and includes the `CRMEventSrchRec` complex element for each event record returned.

### CRMEventSrchRec

The `CRMEventSrchRec` complex element contains a package of data related to an event and includes the following simple elements.

### CRMEventType

This element indicates the type of event.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

### TaxId

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### CustId

This element represents the portfolio of the customer whom the event belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **CRMEventId**

This element represents the unique ID assigned to the event.

#### **CRMEventDt**

This element represents the date that the event was created.

#### **EventCrtOffCode**

This element represents the code for the associate who created the event.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **EventCrtOffDesc**

This element represents the name of the associate who created the event.

#### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

#### **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

#### **EventCmnt**

This element represents any comments for the event.

#### **CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

### **EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

### **EventDueDate**

This element indicates the date that the event is needed by.

### **EventStatCode**

This element represents the status code of the event.

### **EventStatDesc**

This element represents the descriptive text of the status of the event.

### **CRMEventDesc**

This element represents the summary for the event.

### **EscDt**

This element represents the date that the event was escalated.

### **PersonName**

This complex element contains the following elements.

## **ComName**

## **ComName**

This element represents the customer's full name.

# FirstName

## FirstName

This element represents the customer's first name.

# LastName

## LastName

This element represents the last name of the customer.

## CRM Event Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventInq

The CRM event inquiry service returns element details for a specific event. The event identification element **CRMEventId** and the event type **CRMEventType** are required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to event information.

The event inquiry service uses a typical exchange of *Mtype* messages to retrieve profile information for a specific event, based on the event ID and type of event. If the event ID is not known, the consumer must first perform an event search to obtain the event ID for the desired event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Event Search Request

CRMEventSrchrq\_MType

The consumer sends the CRMEventSrchrq\_MType message containing the required element **CRMEventType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

### CRM Event Search Response

CRMEventSrchrS\_MType

The service provider sends the CRMEventSrchrS\_MType message containing an echo of the request, plus CRMEventSrchrArray.

### CRM Event Inquiry Request

CRMEventInqrq\_MType

The consumer sends the CRMEventInqrq\_MType message containing the required elements **CRMEventId** and **CRMEventType** for the desired event.

### CRM Event Inquiry Response

CRMEventInqrS\_MType

The service provider sends the CRMEventInqrS\_MType message containing an echo of the request, plus CRMEventInfoRec.

## Request

The third-party consumer forwards the CRMEventInq request message to the service

provider.

The following general errors or warnings may occur with the `CRMEventInq` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

### **CRMEventId (Required)**

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8030	Error	<i>CRMEventId is required.</i>

### **CRMEventType (Required)**

This element indicates the type of event to be searched.

The value `SVC` is sent to indicate that a service event is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>
8035	Error	<i>CRMEventType is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## IncXtendElemArray (Optional)

This array is used to request additional, optional information pertaining to the service event.

### IncXtendElemInfo

The `IncXtendElemInfo` complex element contains a single record indicating the additional optional information being requested.

## XtendElem

This element represents the additional, optional information being requested. Currently, `x_CRMRelActArray` and `x_CRMAuditHistArray` are the only supported values.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMEventInq` response message to the service consumer, which returns element details for a specific event based on the **CRMEventId** that was requested.

The following arrays, simple, and complex elements are contained within the `CRMEventInq` response and are applicable for Synapsys CRM Services.

## ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMEventInqRec

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

## CRMEventInfoRec

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

## CRMEventDesc

This element represents the summary for the event.

### **EventCrtOffCode**

This element represents the code for the associate who created the event.

### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

### **EventCmnt**

This element represents any comments for the event.

### **CRMEventRecv**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

### **EventPrivType**

This element indicates whether the event has been flagged as a private event.

Canonical values are:

- *True*
- *False*

### **EventDueDate**

This element indicates the date that the event is needed by.

### **EventStatCode**

This element represents the status code of the event.

## EventCatCode

This element represents the type of event.

## CRMOffArray

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

## CRMOffRec

## CRMOffRec

This element contains a collection of values for an associate affiliated with the event. It contains the following simple elements.

## CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *SecondaryAssoc*
- *CC*

## CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

## CRMOffDesc

## CRMOffDesc

This element represents the name of the associate that is affiliated with the event.

## **CRMAcctArray**

This array is a collection of accounts that are associated with the event. It contains the complex `CRMAcctInfoRec` element.

# CRMAcctInfoRec

## CRMAcctInfoRec

The `CRMAcctInfoRec` complex element contains a package of data that represents an account that is related to an event. It includes the following simple elements.

# AcctId

## AcctId

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

# AcctType

## AcctType

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

## **UserDefInfoArray**

This array is a collection of additional information that is associated with the event and contains the complex `UserDefInfo` element.

# UserDefInfo

## UserDefInfo

This element contains a collection of additional information that is associated with the event and contains the following simple elements.

# UserDefTxt

# UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

# UserDefCode

# UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

# UserDefDesc

# UserDefDesc

This element represents the description of the additional information that is related to the event.

# UserDefInfo1

# UserDefInfo1

When the data type is client account, this element contains the product code family (e.g., savings, checking, etc.) that is associated with the account number provided in **UserDefTxt**.

# UserDefInfo2

# UserDefInfo2

When the data type is client account, this element represents a specific type of deposit, loan, or additional service associated with the account number provided in **UserDefTxt**.

## **EscltDlt**

This element represents the date the service event was escalated.

## **WorkflowProcStat**

This element indicates if the service event is locked down due to an Enterprise Workflow

process.

### **CRMEventId**

This element represents the unique ID assigned to the event.

### **CRMEventType**

This element indicates the type of event. The value *svc* is always received when searching for service events.

### **CustId**

This element represents the portfolio of the customer whom the event belongs to.

### **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

### **TaxId**

This element represents the Social Security Number or tax ID of the customer or prospective customer that the event belongs to.

### **EventCrtOffDesc**

This element represents the name of the associate who created the event.

### **EventOffDesc**

This element represents the code for the associate whom the event is assigned to.

### **EventStatDesc**

This element represents the descriptive text of the status of the event.

### **EventCatDesc**

This element represents the descriptive text of the category of the event.

## **X\_CRMRelActArray**

When requested, this array is used to return related activities pertaining to the service event.

### **CRMRelActInfo**

This complex element contains a package of information about a single activity that is related to a service event.

### **CRMActType**

This element represents the type of Synapsys activity being returned.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

### **CRMActId**

The **CRMActId** element represents the unique ID of the specific activity being returned.

### **CRMActDt**

This element represents the date that the activity was added.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **ActCrtStatDesc**

This element represents the descriptive value of the status that is associated with the activity.

## **CRMActRmk**

When **CRMActType** = *Meet*, this element represents the purpose of the meeting.

When **CRMActType** = *Msg*, this element represents the purpose of the mailing.

When **CRMActType** = *Phone*, this element represents the purpose of the phone call.

When **CRMActType** = *Note*, this element represents the text of the note.

## **ModOffCode**

This element represents the code of the associate who modified the service event.

## **ModOffDesc**

This element represents the name of the associate who modified the service event.

## **ModTimeDt**

This element represents the date and time the associate modified the service event.

## **x\_CRMAuditHistArray**

When requested, this array is used to return the audit history information for the service event. It contains the complex `CRMAuditHistoryRec` element.

## **CRMAuditHistoryRec**

The `CRMAuditHistoryRec` complex element contains data that represents the audit history information. It includes the simple elements `ChngDesc`, `PrevVal`, `NewVal`, `ModOffCode`, `ModOffCodeDesc`, and `ModTimeDt`.

# ChngDesc

# ChngDesc

This element contains the description of the change that occurred on the service event.

# PrevVal

## PrevVal

This element contains the previous value.

## NewVal

## NewVal

This element contains the new value.

## ModOffCode

## ModOffCode

This element represents the code of the associate who modified the service event.

## ModOffDesc

## ModOffDesc

This element represents the name of the associate who modified the service event.

## ModTimeDt

## ModTimeDt

This element represents the date and time the associate modified the service event.

## **CRM Event Modify**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMEventMod

The CRM event modify feature allows the service consumer to modify certain elements for a specific event. The **CRMEventId**, **ActIntentKey**, and **CRMEventType** elements are required on the modified request.

The event modification service uses a typical exchange of `Mtype` messages to allow updates to the information for a specific event, based on the event ID. An event Inquiry

must be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

### CRM Event Inquiry Request

CRMEventInqRq\_MType

The consumer sends the CRMEventInqRq\_MType message containing the required elements **CRMEventId** and **CRMEventType** for the desired event.

### CRM Event Inquiry Response

CRMEventInqRs\_MType

The service provider sends the CRMEventInqRs\_MType message containing an echo of the request plus **CRMEventInfoRec**.

### CRM Event Mod Request

CRMEventModRq\_MType

The consumer sends the CRMEventModRq\_MType message containing the required complex element **CRMClient** with the required simple element **CRMClientId** for the desired customer.

### CRM Event Mod Response

CRMEventModRs\_MType

The service provider sends the CRMEventModRs\_MType message containing the response status **RsStat** indicating if the mod was successful. An unsuccessful mod request also returns the errors that prevented the mod.

## Request

The third-party consumer forwards the CRMEventMod request message to the service provider.

The following general errors or warnings may occur with the `CRMEventMod` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8123	Fault	<i>The officer does not have sufficient privileges to edit.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to `CRMEventMod` request message.

The following error codes are valid for this request message.

Error ID	Category	CRMEventType	Description
8152	Fault	Sale	<i>The officer does not have sufficient privileges to edit.</i>

Error ID	Category	CRMEventType	Description
8114	Fault	Sale, Svc	The officer permission AllowViewPvtEvent is set to False.
8119	Fault	Sale, Svc	Officer requesting does not have sufficient privileges to delete.
8124	Fault	Sale, Svc	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8138	Fault	Sale, Svc	A required user defined field was not supplied.
8116	Fault	Svc	CanReceiveServiceEvents = False for the officer this event is being assigned to.
8123	Fault	Svc	The officer does not have sufficient privileges to edit.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	CRMEventType	Description
8007	Warning	Sale, Svc	The ErrCode is invalid.

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>8114</ElemCanocVal>
    <ElemCanocValDesc> The officer permission AllowViewPvtEvent is set to
      False.</ElemCanocValDesc>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>8116</ElemCanocVal>
    <ElemCanocValDesc>CanReceiveServiceEvents = False for the officer this event is being
      assigned to.</ElemCanocValDesc>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### CRMEventId (Required)

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	CRMEventType	Description
8029	Error	Sale, Svc	<i>CRMEventId is invalid.</i>
8030	Error	Sale, Svc	<i>CRMEventId is required.</i>

### CRMEventType (Required)

This element indicates the type of event to be modified.

The value *Svc* should send to indicate that a service event is modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8034	Error	<i>Incen is not yet supported by this service.</i>

Error Id	Category	Description
8035	Error	<i>CRMEventType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## Dlt (Optional)

This element represents the deletion of the specified event.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## RelActDlt (Optional)

This element indicates whether to delete any related Synapsys activities that may be associated with the event and is only considered when **Dlt** = *True*.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8080	Error	<i>RelActDlt is invalid.</i>
8187	Error	<i>Dlt must be true when RelActDlt = True.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMEventInfoRec (Required when Dlt = False, Optional when Dlt = True)

The `CRMEventInfoRec` complex element contains a package of data related to an event and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8031	Error	<i>CRMEventInfoRec is required.</i>
8054	Error	<i>The financial institution has chosen not to enable Service Events.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8116	Fault	<i>CanReceiveServiceEvents = False for the officer this event is being assigned to.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>

### **CRMEventDesc (Optional)**

This element represents the summary for the event.

This element allows for a maximum of 100 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

## EventOffCode (Optional)

This element represents the code for the associate whom the event is assigned to. If not provided, the event is assigned to the user that is submitting the Synapsys CRM Service request.

### NOTE

If the associate is not entitled to view the service event category, the associate is not available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

### NOTE

When the event is assigned to a queue, the status cannot be terminating.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8058	Error	<i>EventOffCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8116	Fault	<i>CanReceiveServiceEvents = False for the officer this event is being assigned to.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.

- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *IsQueueOfficer*, **CanocValTxt** contains *true* or *false*, indicating if the officer represented in **ElemCanocVal** is a queue officer.
  - When **CanocValDetail** = *AllowViewPvtEvent*, **CanocValTxt** contains *true* or *false* indicating if the officer represented in **ElemCanocVal** has permissions to view private events.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>7</ElemCanocVal>
    <ElemCanocValDesc>Refund Type</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>ParentCategory</CanocValDetail>
        <CanocValTxt>Common</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryDescription</CanocValDetail>
        <CanocValTxt>Comment parent category</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>30</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryPresentationOrdinal</CanocValDetail>
        <CanocValTxt>10</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInDesktop</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInCallCenter</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeDefault</CanocValDetail>
        <CanocValTxt>20</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeAssignToMeDefault</CanocValDetail>
        <CanocValTxt>30</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventOffCodeDefault</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## EventCmnt (Optional)

This element represents any comments for the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8126	Error	<i>Comments are not visible for this Event or Activity.</i>
8065	Error	<i>JHANull is not supported for element.</i>

### **CRMEventRecv (Optional)**

This element indicates whether the event is marked read by the associate that it is assigned to.

Canonical values are:

- *True*
- *False*

If the **CRMEventRecv** is blank (or not sent) and a terminating status is sent, the event is marked as read.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8032	Error	<i>CRMEventRecv is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## EventPrivType (Optional)

This element indicates whether the event is marked as private and depends on the system setting **UsePrivateEventFlag**.

When **UsePrivateEventFlag** is *False*, the **EventPrivType** is not supported. Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8059	Error	<i>EventPrivType is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

When the system setting **UsePrivateEventFlag** is set to *false*, this element is not returned

in the **SvcDictSrchrRs**.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### EventDueDt (Optional)

This element indicates the date needed by for the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8057	Error	<i>EventDueDt is invalid.</i>

### EventStatCode (Optional)

This element represents the status code of the event.

**NOTE**

When the event is assigned to a queue, the status cannot be terminating.

If a terminating status is sent and the **CRMEventRecv** is blank (or not sent), the event is marked as read.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8060	Error	<i>EventStatCode is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8157	Error	<i>The officer does not have sufficient privileges to set the Event or Activity to a terminating status.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `IsTerminating`, **CanocValTxt** contains `true` or `false` indicating if the status represented in **ElemCanocVal** is a terminating status or not.

**CAUTION**

When the **EventStatCode** is a terminating status, **UserDefCode** is required if it has been identified as required when the status is set to a terminating status. See **UserDefCode** for additional information.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>389</ElemCanocVal>
      <ElemCanocValDesc>New Event</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMOffArray (Optional)

This array indicates the single associate to be assigned to the prospect and contains the complex element `CRMOffRec`. Only one is permitted.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8123	Error	<i>The officer does not have sufficient privileges to edit.</i>
8143	Error	<i>There are either no records in the array or more than the allowed number of records were sent to the service.</i>

## CRMOffRec

This element contains a collection of values for an associate affiliated with the event. It contains the following simple elements.

# CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the event.

### NOTE

If the associate is not entitled to view the service event category, the associate is not available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

Canonical values are:

- *SecondaryAssoc*
- *CC*

Passing **JHANull** = *True* on this element has no effect.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8039	Error	<i>CRMOffCode is required.</i>
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains all the possible officers available for the value specified in **ElemCanocVal**.

- **CanocValDetail** represents the associate code to be passed in **CRMOffCode**.
- **CanocValText** represents the name of the associate represented in **CanocValDetail**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>SecondaryAssoc</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended for the
      SecondaryAssoc1 field.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████████</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>CC</ElemCanocVal>
    <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended as a cc
      officer.</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>SAT</CanocValDetail>
        <CanocValTxt>Sally A ██████████</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>JAT</CanocValDetail>
        <CanocValTxt>Joe A ██████████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMOffCode

## CRMOffCode

This element represents the code of the associate that is affiliated with the event.

### NOTE

If the associate is not entitled to view the service event category, the associate is not

available in the list, and they cannot be an AssignedTo, Secondary, or CC associate.

Passing **JHAnull** = *True* on this element causes the fields being referenced **CRMOffCodeText** to be blanked out.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8116	Fault	<i>CanReceiveServiceEvents = False for the officer this event is being assigned to.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### **CRMAcctArray (Optional)**

This array is a collection of accounts that are associated with the event. It contains the complex `CRMAcctInfoRec` element.

### **CRMAcctInfoRec**

`CRMAcctInfoRec` contains a collection of simple elements. If any records exist within the array, the simple elements must be provided.

# AcctId (Required)

# AcctId (Required)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

Passing **JHANull** = *True* on this element causes the field being referenced in this element to be blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8136	Error	<i>The value provided is not a valid value for the item being updated.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents the value to be sent in **AcctType**.
- The `CanocValInfoArray` contains the following additional information.
  - When `CanocValDetail = AcctTypeDescription`, `CanocValTxt` contains the friendly description of the value stored in `ElemCanocValDesc`.
  - When `CanocValDetail = CRMProdCodeDescription`, `CanocValTxt` contains an additional friendly description further describing the value stored in `ElemCanocVal`.
  - When `CanocValDetail = Status`, `CanocValTxt` contains the status associated with the value stored in `ElemCanocVal`.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>[REDACTED]</ElemCanocVal>
      <ElemCanocValDesc>4</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AcctTypeDescription</CanocValDetail>
          <CanocValTxt>Deposit</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>CRMPProdCodeDescription</CanocValDetail>
          <CanocValTxt>Free Checking</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>Status</CanocValDetail>
          <CanocValTxt>A</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# AcctType (Required)

# AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

Passing **JHANull** = *True* on this element has no effect.

Valid values for **AcctType** are obtained in `SvcDictInfoArray` of the Service Dictionary Search response for the **AcctId** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	CRMEventType	Description
8129	Error	Svc	<i>This element is required.</i>

## UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8189	Error	<i>The value(s) provided in the UserDefInfoArray combined with what is stored in the database (only existing events) is invalid due to configured dependencies.</i>

## UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

## UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

Passing **JHANull** = *True* on this element has no effect.

When the **Detail** entry is defined as a number, this element allows for maximum of 38 characters.

When the **Detail** entry is defined as an integer, this element allows for a maximum of 10 characters.

When the **Detail** entry is defined as text, this element allows for a maximum of 7,500 characters.

The following errors, warnings, or faults may occur with this element.

<b>Error ID</b>	<b>Category</b>	<b>Description</b>
8093	Error	The <UserDefCode> is defined as Application and <UserDefTxt> is not a valid application.
8094	Error	The <UserDefCode> is defined as Branch and <UserDefTxt> is not a valid branch.
8095	Error	The <UserDefCode> is defined as ClientAccount and <UserDefTxt> is not a valid account for the client.
8096	Error	The <UserDefCode> is defined as a Date and <UserDefTxt> is not a date.
8097	Error	The <UserDefCode> is defined as an Integer and <UserDefTxt> is not a whole number.
8099	Error	The <UserDefCode> is defined as Number and <UserDefTxt> is not a number.
8100	Error	The <UserDefCode> is defined as Officer and <UserDefTxt> is not a valid officer.
8101	Error	UserDefTxt is required.
8102	Error	The <UserDefCode> is defined as UDList and <UserDefTxt> is not a valid list value.
8125	Error	The max size has been exceeded for this element.
8137	Error	The field you are trying to blank out is required. JHANull is not accepted.
8163	Error	The element is currently locked down because the Event/Activity is currently in a workflow.
8189	Error	The value(s) provided in the UserDefInfoArray combined with what is stored in the database

Error ID	Category	Description
		<i>(only existing events) is invalid due to configured dependencies.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the friendly text that appears in drop-down lists when the associated data type of the **UserDefCode** is *UDList, Officer, Branch, Application, Or ClientAccount*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode**, which indicates the user-defined field to associate the value in **ElemCanocVal** with. It is always necessary to provide **UserDefCode** for every user-defined field that is being modified.
  - When **CanocValDetail** = *UserDefTxt*, **CanocValTxt** contains the unique value assigned to the value in **ElemCanocVal**, which indicates the user-defined field to associate the value with. It is always necessary to provide **UserDefText** for every user-defined field that is being modified.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** indicates the order the value should appear in the drop-down list on the form and is only provided when the data type is *UDList*.
  - When **CanocValDetail** = *IsDefaultSelection*, **CanocValTxt** contains *True* or *False* to indicate if the value provided in **ElemCanocVal** is the default selection when the data type is *UDList*.
  - When **CanocValDetail** = *UserDefInfo1*, **CanocValTxt** contains the unique value that indicates the type of account that was returned in **ElemCanocVal**. It is only necessary to provide **UserDefCode1** when the data type is *ClientAccount*.
  - When **CanocValDetail** = *UserDefInfo2*, **CanocValTxt** contains the unique value that further indicates the type of account that was returned in **ElemCanocVal**. It is only necessary to provide **UserDefCode2** when the data type is *ClientAccount*.
  - When **CanocValDetail** = *ConditionallyDisplayedByUserDefCode*, **CanocValTxt** indicates whether the conditionally displayed fields appear or not based on your answer to the initial question.

**NOTE**

There may be multiple values.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SD</ElemCanocVal>
      <ElemCanocValDesc>SD</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>UserDefCode</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTxt</CanocValDetail>
          <CanocValTxt>10</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsDefaultSelection</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefCodeDependency</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UserDefTextDependency</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    <SvcPrvdInfo></SvcPrvdInfo>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>Sioux Falls</ElemCanocVal>
    <ElemCanocValDesc>Sioux Falls</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>

```

```

    <CanocValDetail>UserDefCode</CanocValDetail>
    <CanocValTxt>12</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UserDefTxt</CanocValDetail>
  <CanocValTxt>20</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>IsDefaultSelection</CanocValDetail>
  <CanocValTxt>True</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UserDefCodeDependency</CanocValDetail>
  <CanocValTxt>1</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UserDefTextDependency</CanocValDetail>
  <CanocValTxt>10</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt><</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>██████ - CheckingMoney/Market (COMMON SENSE CKG)</ElemCanocVal>
  <ElemCanocValDesc>██████ - CheckingMoney/Market (COMMON SENSE CKG)</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>██████</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>

```

```
<CanocValInfo>
  <CanocValDetail>UserDefInfo1</CanocValDetail>
  <CanocValTxt>2</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefInfo2</CanocValDetail>
  <CanocValTxt>35</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>: [REDACTED] </ElemCanocVal>
  <ElemCanocValDesc>: [REDACTED] </ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>6</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>38</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>: [REDACTED] </ElemCanocVal>
  <ElemCanocValDesc>: [REDACTED] </ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>4</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>
```

```

<CanocValInfo>
  <CanocValDetail>UserDefTxt</CanocValDetail>
  <CanocValTxt> </CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>Deposits</ElemCanocVal>
  <ElemCanocValDesc>Deposits</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>5</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
      <CanocValTxt></CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>Yes</ElemCanocVal>
  <ElemCanocValDesc>Yes</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
      <CanocValTxt>7</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>

```

```

<CanocValInfo>
  <CanocValDetail>UserDefTxt</CanocValDetail>
  <CanocValTxt>28</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>IsDefaultSelection</CanocValDetail>
  <CanocValTxt>False</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefCodeDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTextDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt>8</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
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  <ElemCanocVal>No</ElemCanocVal>
  <ElemCanocValDesc>No</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>UserDefCode</CanocValDetail>
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    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>21</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsDefaultSelection</CanocValDetail>
      <CanocValTxt>False</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefCodeDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UserDefTextDependency</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplaysUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## UserDefCode (Required)

## UserDefCode (Required)

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

Passing **JHANull** = *True* on this element causes the field being referenced in this element to be blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8089	Error	<i>UserDefCode is invalid.</i>
8090	Error	<i>UserDefCode is required.</i>

Error Id	Category	Description
8154	Error	<code>LockDownOnSave is set to true for this user defined field.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `DataType`, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values are: `UDList`, `Text`, `Date`, `Number` (decimals), `Integer` (no decimals), `Officer`, `Branch`, `Application`, or `ClientAccount`.
  - When **CanocValDetail** = `IsRequired`, **CanocValTxt** contains `true` or `false` to indicate if the user-defined field returned in **ElemCanocVal** is required or not.
  - When **CanocValDetail** = `EventCatCode`, **CanocValTxt** indicates if the **EventCatCode** the user-defined field returned in **ElemCanocVal** is associated with.
  - When **CanocValDetail** = `UDGroupName`, **CanocValTxt** indicates the grouping the user-defined field returned in **ElemCanocVal** should be associated with on an event form.
  - When **CanocValDetail** = `UDGroupNamePresentationOrdinal`, **CanocValTxt** indicates the order the group should be displayed on a service event form.
  - When **CanocValDetail** = `UDPresentationOrdinal`, **CanocValTxt** indicates the order the user-defined field should be displayed within a grouping on a service event form.
  - When **CanocValDetail** = `RequireAtTermination`, **CanocValTxt** contains `true` or `false` to indicate if the user-defined field returned in **ElemCanocVal** is required when **EventStatCode** is a terminating status.

#### CAUTION

When the **UserDefCode** has **RequireAtTermination** = `True` and **ReferStatCode** is a terminating status, **UserDefCode** should be required. See **ReferStatCode** for additional information.

- When **CanocValDetail** = `DataLength`, **CanocValTxt** contains the max length allowed. This information is only provided when the datatype is text, integer, or number.
- When **CanocValDetail** = `ConditionallyDisplayedByUserDefCode`, **CanocValTxt** indicates whether the conditionally displayed fields appear or not based on your answer to the initial question.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1</ElemCanocVal>
      <ElemCanocValDesc>How satisfied are you?</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>UDList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCatCode</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupName</CanocValDetail>
          <CanocValTxt>Demographics</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>RequireAtTermination</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
          <CanocValTxt></CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
  
```

```
<ElemCanocRec>
  <ElemCanocVal>2</ElemCanocVal>
  <ElemCanocValDesc>Description</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Text</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>RequireAtTermination</CanocValDetail>
      <CanocValTxt>>true</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>
```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>DataLength</CanocValDetail>
  <CanocValTxt>100</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>3</ElemCanocVal>
  <ElemCanocValDesc>Choose the Client Account</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>ClientAccount</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
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    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Accounts</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
  </CanocValInfo>

```

```

    <CanocValDetail>RequireAtTermination</CanocValDetail>
    <CanocValTxt>>false</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>4</ElemCanocVal>
  <ElemCanocValDesc>Choose the Officer</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Officer</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
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    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
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    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UserDefTxt</CanocValDetail>
      <CanocValTxt>TMZ</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
  <CanocValTxt>3</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
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</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>5</ElemCanocVal>
  <ElemCanocValDesc>Choose the Application</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Application</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Accounts</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>2</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocRec>

```

```

    <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
    <CanocValTxt>2</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
  <CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
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<ElemCanocRec>
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    <CanocValInfo>
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    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Demographics</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>

```

```

</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
  <CanocValTxt>2</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
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</CanocValInfo>
<CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt></CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>7</ElemCanocVal>
  <ElemCanocValDesc>Do you have children?</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>UDList</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupName</CanocValDetail>
      <CanocValTxt>Children</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>
    </CanocValInfo>
  </CanocValInfo>

```

```

    <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
    <CanocValTxt>2</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>RequireAtTermination</CanocValDetail>
    <CanocValTxt>>false</CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>TriggerDisplayField</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>TriggerDisplayValue</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfo>
  <CanocValInfo>
    <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
    <CanocValTxt></CanocValTxt>
  </CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
<ElemCanocRec>
  <ElemCanocVal>8</ElemCanocVal>
  <ElemCanocValDesc>Number of Children?</ElemCanocValDesc>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>DataType</CanocValDetail>
      <CanocValTxt>Text</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsRequired</CanocValDetail>
      <CanocValTxt>>false</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>EventCatCode</CanocValDetail>
      <CanocValTxt>1</CanocValTxt>

```

```

  </CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UDGroupName</CanocValDetail>
  <CanocValTxt>Children</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UDGroupPresentationOrdinal</CanocValDetail>
  <CanocValTxt>1</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>UDPresentationOrdinal</CanocValDetail>
  <CanocValTxt>2</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>RequireAtTermination</CanocValDetail>
  <CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfo>
  <CanocValDetail>ConditionallyDisplayedByUserDefCode</CanocValDetail>
  <CanocValTxt>7</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
<SvcPrvdInfo></SvcPrvdInfo>
</ElemCanocRec>
</ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## UserDefInfo1

# UserDefInfo1

This element represents code that is associated with the product code family (e.g., savings, checking, etc.) that is associated with the account number provided in **UserDefTxt**.

When the datatype is specified as *ClientAccount* for **UserDefCode**, **UserDefInfo1** is required.

Valid values for **UserDefInfo1** can be obtained in *SvcDictInfoArray* of Service Dictionary Search response for the **UserDefTxt** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

# UserDefInfo2

# UserDefInfo2

This element represents a specific type of deposit, loan, or additional service associated with the account number provided in **UserDefTxt**.

When the datatype is specified as *ClientAccount* for **UserDefCode**, **UserDefInfo2** is required. Valid values for **UserDefInfo2** are obtained in *SvcDictInfoArray* of the Service Dictionary Search response for the **UserDefTxt** element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

## CRMTerRsnDesc

This element represents the reason that the event was terminated.

## WorkflowProcStat

This complex element indicates whether a record is under the control of a workflow process.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>

## Response

The service provider (Synapsys) returns the `CRMEventMod` response message to the service consumer which contains the following simple elements.

### EventCatCode

This element represents the category of event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8055	Error	<i>EventCatCode is invalid.</i>
8056	Error	<i>EventCatCode is required.</i>
8202	Error	<i>The officer does not have permission to add an event with this EventCatCode.</i>
8204	Error	<i>The incorrect EventCatCode was provided for</i>

Error ID	Category	Description
		<code>the LobbyQueId value provided.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `ParentCategory`, **CanocValTxt** contains the friendly name of the parent category grouping that the category appears in.
  - When **CanocValDetail** = `ParentCategoryDescription`, **CanocValTxt** additional helpful information about the parent category. As a consumer you can choose to display this in a tooltip.
  - When **CanocValDetail** = `ParentCategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the parent category appears.
  - When **CanocValDetail** = `CategoryPresentationOrdinal`, **CanocValTxt** contains a numeric representation of the order the category displays in within a parent category grouping.
  - When **CanocValDetail** = `VisibleInDesktop`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys CRM Desktop application.
  - When **CanocValDetail** = `VisibleInCallCenter`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys plug-in displayed in the jhaCC application.
  - When **CanocValDetail** = `VisibleInLobbyTracking`, **CanocValTxt** contains `true` or `false` indicating if the category is intended to be available for use in the Synapsys Lobby Tracking application.
  - When **CanocValDetail** = `EventStatCodeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category.
  - When **CanocValDetail** = `EventStatCodeAssignToMeDefault`, **CanocValTxt** contains the `StatusId` of the default status for the category when performing the **Assign To Me** option.
  - When **CanocValDetail** = `EventOffCodeDefault`, **CanocValTxt** contains the default officer code for the category.
  - When **CanocValDetail** = `ParentCategoryVisibleInDesktop`, **CanocValTxt** contains `true` or `false` indicating if the parent category is intended to be available for use in

the Synapsys CRM Desktop application.

- When **CanocValDetail** = *ParentCategoryVisibleInCallCenter*, **CanocValTxt** contains *true* or *false* indicating if the parent category is intended to be available for use in the Synapsys plug-in displayed in the jhaCC application.
- When **CanocValDetail** = *ParentCategoryVisibleInLobbyTracking*, **CanocValTxt** contains *true* or *false* indicating if the parent category is intended to be available for use in the Synapsys Lobby Tracking application.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>7</ElemCanocVal>
    <ElemCanocValDesc>Refund Type</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>ParentCategory</CanocValDetail>
        <CanocValTxt>Common</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryDescription</CanocValDetail>
        <CanocValTxt>Comment parent category</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CategoryPresentationOrdinal</CanocValDetail>
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      </CanocValInfo>
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      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInDesktop</CanocValDetail>
        <CanocValTxt>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInCallCenter</CanocValDetail>
        <CanocValTxt>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>VisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInDesktop</CanocValDetail>
        <CanocValTxt>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInCallCenter</CanocValDetail>
        <CanocValTxt>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ParentCategoryVisibleInLobbyTracking</CanocValDetail>
        <CanocValTxt>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeDefault</CanocValDetail>
        <CanocValTxt>20</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatCodeAssignToMeDefault</CanocValDetail>
        <CanocValTxt>30</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventOffCodeDefault</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishCreate</CanocValDetail>
        <CanocValTxt>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishUpdate</CanocValDetail>
        <CanocValTxt>true</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PublishDelete</CanocValDetail>
        <CanocValTxt>false</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Campaign Activity Services

Synapsys has messaging services for the search, inquiry, and modification of campaign activity information on service providers.

### CRM Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActInq

The CRM activity inquiry service returns element details for a specific activity. The **CRMActId** (activity identification) element and **CRMActType** (activity type) element are both required on the request.

The design of the inquiry was created in a manner that facilitates addition and

modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## **Message Flow**

## CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the CRMActSrchrq\_MType message containing the required element **CRMActType** and at least one of the optional search elements: **Accountid**, **Custid**, **Taxid**, **StartDate**, or **EndDate**.

## CRM Activity Search Response

CRMActSrchrS\_MType

The service provider sends the CRMActSrchrS\_MType message containing an echo of the request CRMActSrchrArray.

## CRM Activity Inquiry Request

CRMActInqrq\_MType

The consumer sends the CRMActInqrq\_MType message containing the required elements **CRMActid** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqrS\_MType

The service provider sends the CRMActInqrS\_MType message containing an echo of the request plus CRMActInfoRec.

## Request

The third-party consumer forwards the CRMActInq request message to the service provider.

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMActInq` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### **CRMActType (Required)**

This element represents the type of Synapsys activity being searched.

The value `Cmpgn` is sent to indicate that a campaign activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Cmpgn</ElemCanocVal>
      <ElemCanocValDesc>Campaign Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMActId (Required)

This element represents a specific activity within the Synapsys database when it is combined with the **CRMActType** that is provided in the CRMActInq request message.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8022	Error	<i>CRMActId is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>ReadOnly</ElemCanocVal>
      <ElemCanocValDesc>Read Only</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Upd</ElemCanocVal>
      <ElemCanocValDesc>Upd</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Dlt</ElemCanocVal>
      <ElemCanocValDesc>Dlt</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMActInq` response message to the service consumer, which returns element details for a specific activity based on the **CRMActId** and **CRMActType** that was requested.

The following arrays, simple elements, and complex elements are contained within the `CRMActInq` response applicable for Synapsys CRM Services.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMActInqRec

The CRMActInqRec complex element contains a package of data related to a Synapsys activity and includes the following arrays, simple elements, and complex elements.

## CRMActInfoRec

The CRMActInfoRec complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

## CRMActDt

When **CRMActType** = *Cmpgn*, this element represents the start date of the campaign activity.

## ActCrtOffCode

This element represents the code for the associate who created the activity.

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the unique value that is returned in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## ActOffArray

This element returns an array of associates related to the activity.

## CRMOffRec

## CRMOffRec

This element contains a package of data related to associates affiliated with the activity. It contains the following simple elements.

## CRMOffCode

## CRMOffCode

This element represents the associate who is assigned to the activity.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████ </ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████ </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMOffDesc

# CRMOffDesc

This element represents the name of the associate that is affiliated with the activity.

## ActCmnt

This element represents any comments for the activity.

## CRMActRecv

This element indicates whether the associate that is designated as the campaign officer has read the activity.

Canonical values are:

- *True*
- *False* (default)

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMActStatCode

This element represents the code of the status on the activity. This element is only returned when **CRMActType** = *Cmpgn*.

## ActExpDt

This element represents the expiration date of the activity.

## WorkflowProcStat

This element indicates whether the event should be locked down.

This element is only supported for jhaEnterprise Workflow.

The **Rstr** attribute is hidden for this service.

## CRMActType

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the unique value that is returned in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Cmpgn</ElemCanocVal>
      <ElemCanocValDesc>Campaign Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

### **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

### **CRMRelCode**

This element represents the relcode1 of the customer that the activity belongs to.

### **TaxId**

This element represents the customer's Social Security Number or tax ID. The **MaskVal** attribute value is set according to the system setting **MaskSSN**.

### **CRMEventId**

This element represents the unique ID assigned to the event.

### **CRMEventType**

This element indicates the type of event to be searched.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **CRMActStatDesc**

This element represents the descriptive value of the status that is associated with the activity. **CRMActStatDesc** is only returned when **CRMActType** = *Cmpgn*.

### **x\_MktCmpgnInfoArray**

This array is used to request additional, optional information pertaining to the marketing campaign.

## **MktCmpgnInfoRec**

This complex element contains a collection of simple elements for a marketing campaign.

### MktCmpgnID

### MktCmpgnID

This element represents the unique ID of the specific marketing campaign being returned.

### MktCmpgnType

### MktCmpgnType

This element represents the type of marketing campaign.

### MktCmpgnName

### MktCmpgnName

This element is the name given to a marketing campaign.

### MktCmpgnDesc

### MktCmpgnDesc

This element is the description given to a marketing campaign.

### MktCmpgnStartDt

### MktCmpgnStartDt

This element is the designated starting date for a marketing campaign.

### MktCmpgnEndDt

### MktCmpgnEndDt

This element is the designated end date for a marketing campaign.

# MktCmpgnExpDt

## MktCmpgnExpDt

This element is the expiration date set for a marketing campaign.

# CRMProdArray

## CRMProdArray

This element is an array of product information for a marketing campaign.

# CRMProdInfoRec

## CRMProdInfoRec

This complex element contains the following simple elements.

# CRMProdCode

## CRMProdCode

This element represents a specific type of product associated with a marketing campaign.

# CRMProdDesc

## CRMProdDesc

This element represents the descriptive name of the type of product associated with a marketing campaign.

# AcctType

## AcctType

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

# AcctTypeDesc

# AcctTypeDesc

This element represents the descriptive name of a valid deposit, loan, or additional service that is associated with the marketing campaign.

## CRM Activity Modify

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActMod

The CRM activity modify service allows the service consumer to modify certain elements for a specific activity. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

The CRM activity modify service uses a typical exchange of `MtType` messages to allow updates to the information for a specific activity, based on the activity ID. An activity inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow

## CRM Activity Inquiry Request

CRMActInqRq\_MType

The consumer sends the `CRMActInqRq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the `CRMActSrchRs_MType` message containing an echo of the request `CRMActSrchArray`.

## CRM Activity Modify Request

CRMActModRq\_MType

The consumer sends the `CRMActModRq_MType` message containing the required **CRMActId**, **CRMActType**, and **ActIntentKey** elements. Additionally, either the `CRMActInfoRec` complex element or **DIt** element must be included for the desired activity.

## CRM Activity Modify Response

CRMActModRs\_MType

The service provider sends the `CRMActModRs_MType` message containing the response status **RsStat** indicating if the modification was successful. An unsuccessful modification request also returns the errors that occurred that prevented the modification.

## Request

The third-party consumer forwards the `CRMActMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMActMod` service. Errors that pertain specifically to an element are listed with that element.

Error Id	CRMEventType	Description
8117	Fault	<i>Officer does not have permission to update this Campaign Activity.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### **ErrOvrRdInfoArray (Optional)**

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMActMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### **ErrCode**

This element represents a valid error code that pertains to the `CRMActMod` request message.

The following error codes are valid for this request message.

Error Id	Description
8115	<i>The Campaign Activity is expired.</i>
8119	<i>Officer requesting does not have sufficient privileges to delete.</i>
8120	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8124	<i>The officer permission AllowActivitiesView, which also</i>

Error Id	Description
	<i>controls the ability to view events, is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8115</ElemCanocVal>
      <ElemCanocValDesc>The Campaign Activity is expired.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8117</ElemCanocVal>
      <ElemCanocValDesc>Officer does not have permission to update this Campaign
        Activity.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMActType (Required)

This element represents the type of Synapsys activity being modified.

The value `Cmpgn` is sent to indicate that a campaign activity is being modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Cmpgn</ElemCanocVal>
      <ElemCanocValDesc>Campaign Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8021	Error	<i>CRMActId is invalid.</i>
8022	Error	<i>CRMActId is required.</i>
8115	Fault	<i>The Campaign Activity is expired.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## Dlt (Optional)

This element represents the deletion of the specified activity.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8222	Error	<i>When the sales event is part of a dynamic campaign it cannot be deleted.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- `ElemCanocVal` and `ElemCanocValDesc` represent the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMActInfoRec (Required when Dlt=False, Optional when Dlt=True)

The CRMActInfoRec complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8023	Error	<i>CRMActInfoRec is required.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>

### ActOffArray (Optional)

This array is a collection of associates who can be associated with the event and contains the complex CRMOffRec element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8016	Error	<i>The record count of officers is invalid for</i>

Error Id	Category	Description
		<i>this service.</i>

### CRMOffRec

This element contains a collection of simple elements.

## CRMOffCode

## CRMOffCode

This element represents the associate who is assigned to the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8120	Fault	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.

- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### ActCmnt (Optional)

This element represents any comments for the activity.

Comments that are sent are appended to existing comments.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8120	Fault	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8065	Error	<i>JHANull is not supported for element.</i>

### CRMActRecv (Optional)

This element indicates whether the associate that is designated as the assigned to has read the activity.

Canonical values are:

- *True*

- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8024	Error	<i>CRMActRecv must be true or false.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMActStatCode (Optional)

This element represents the status of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8025	Error	<i>CRMActStatCode must be a valid status in the</i>

Error Id	Category	Description
		<i>Synapsys database.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8120	Fault	<i>EditCampaignActivitiesOption is set to a value that prevents the consumer from editing the field associated with the element.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8221	Error	<i>The campaign activity was generated as part of Dynamic Campaign and is currently in a status that cannot be edited.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>156</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>157</ElemCanocVal>
      <ElemCanocValDesc>Sold</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## WorkflowProcStat (Optional)

This element indicates whether the event should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```
<SvcDictInfoRec>
  *
  *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  *
  *
</SvcDictInfoRec>
```

## Dlt (Optional)

This element represents the deletion of the specified activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8052	Error	<i>Dlt must be true or false.</i>

Error ID	Category	Description
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8222	Error	<i>When the sales event is part of a dynamic campaign it cannot be deleted.</i>

## Response

The service provider (Synapsys) returns the `CRMActMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# CRM Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActSrch

The CRM activity search service returns all activities for a particular **InstRtid**, based on specified filter criteria. The request provides the following filters:

- **CRMActType** (required)
- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the `CRMCustSrchrq_MType` message containing the required element **CRMActType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

## CRM Activity Search Request

CRMActSrchrS\_MType

The service provider sends the `CRMActSrchrS_MType` message containing an echo of the request plus `CRMActSrchrArray`.

## Request

The third-party consumer forwards the `CRMActSrchr` request message to the service provider.

The element **CRMActType** and at least one of the additional following elements contained within the **CRMActSrchr** request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the **CRMActSrchr** service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Cmpgn* is sent to indicate that a campaign activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

## AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>

Error Id	Category	Description
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### StartDt (Optional)

This optional element designates the starting point used for searching activities based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available activities that have an added date that is less than the specified **EndDt**.

### EndDt (Optional)

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

## Response

The service provider (Synapsys) returns the `CRMActSrch` response message to the service consumer, which returns a list of activity records that meet the specified search criteria.

The following arrays are contained within the `CRMActSrch` response message.

### CRMActSrchArray

This element returns an array of responses for the activity search and includes the `CRMActSrchRec` complex element for each activity record returned.

### CRMActSrchRec

The `CRMActSrchRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### CRMActType

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

### **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

### **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CRMActDt**

When **CRMActType** = *Cmpgn*, this element represents the start date of the campaign activity.

### **CRMOffArray**

This array is a collection of associates who are affiliated with the campaign activity and contains the complex *CRMOffRec* element.

## CRMOffRec

## CRMOffRec

This element contains a package of data related to associates affiliated with a Synapsys campaign activity. It contains the following simple elements.

# CRMOffCodeText

## CRMOffCodeText

This simple element represents the name of the associate who is the designated assigned campaign associate.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

# CRMOffCode

## CRMOffCode

This simple element represents the code of the associate who has been assigned to the campaign activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

# CRMOffDesc

## CRMOffDesc

This simple element represents the affiliation the **CRMOffCode** has with the campaign activity. For campaign activities, the value is always *AssignedTo*.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **ActCmnt**

This element represents any comments for the activity.

### **CRMActRecv**

This element indicates whether the associate that is designated as the assigned to has read the activity.

Canonical values are:

- *True*
- *False* (default)

### **CRMActRmk**

This represents the description of the campaign activity.

### **ActCrtTimeDt**

This element represents the date and time that the activity was added.

### **ActStatCode**

This element represents the status of the campaign activity.

## ActStatDesc

This element represents the status description of the campaign activity.

# CRM Mailing Activity Services

Synapsys has messaging services for the addition and search of mailing activity information on service providers.

## CRM Activity Add

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActAdd

The CRM activity add service allows the service consumer to add an activity into the Synapsys database. The consumer must provide the following:

- A unique customer, which can be identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one element exists on the request, the customer identified is based on the combined effect of the elements (i.e., *and* operator). Each added element value further restricts the client that is identified.

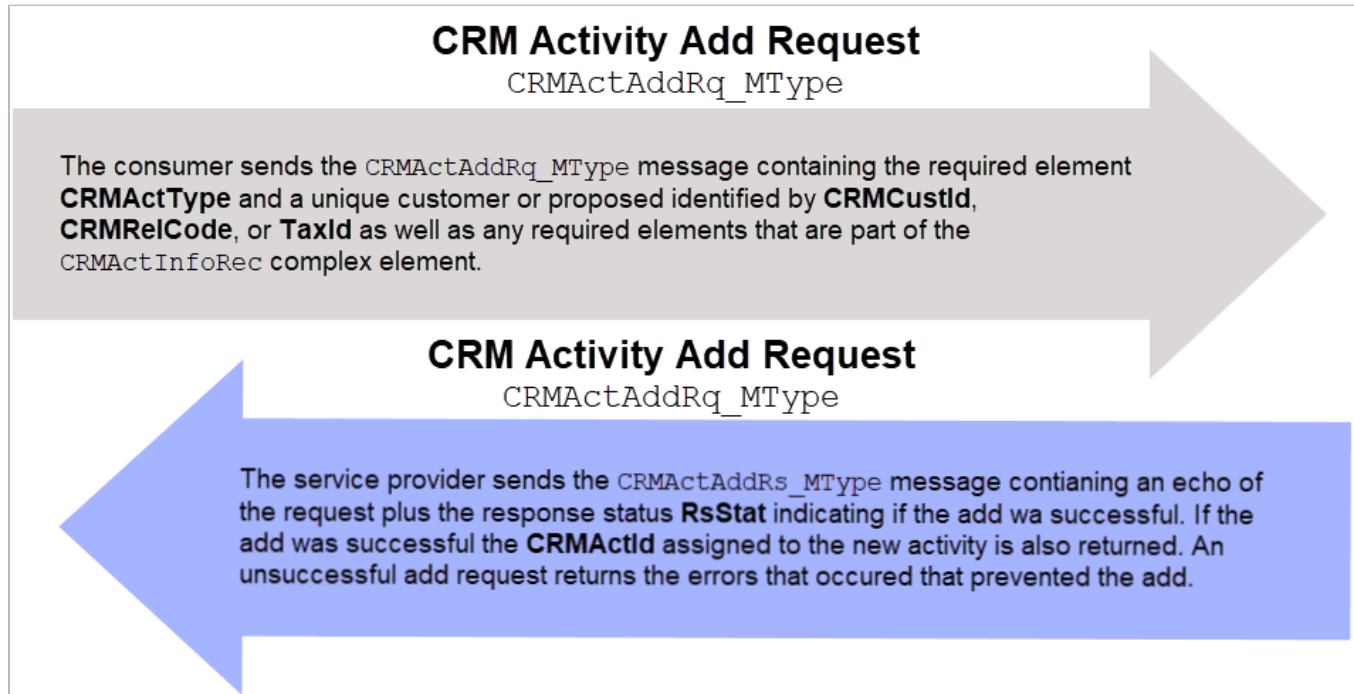
- Any required elements that are part of the `CRMActInfoRec` complex element for the activity.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the CRMActAdd request message to the service provider.

The following general errors or warnings may occur with the CRMActAddservice. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	CRMActType	Description
8019	Error	Msg, Note	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8131	Error	Msg	<i>EnableMailing is set to false.</i>
8134	Error	Note	<i>EnableNotes is set to false.</i>
8107	Fault	Msg, Note	<i>The officer permission</i>

Error Id	Category	CRMAcTType	Description
			<i>AllowActivitiesCreate is set to False.</i>

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMAcTAdd` request message.

The following error codes are valid for this request message.

Error Id	Category	CRMAcTType	Description
8107	Fault	Msg, Note	<i>The officer permission AllowActivitiesCreate is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMAcTType	Description
8007	Warning	Msg, Note	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc> The officer permission AllowActivitiesCreate is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8007</ElemCanocVal>
      <ElemCanocValDesc> The ErrCode is invalid.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### NOTE

For Symitar only, this element may represent the **MBRNumber**.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>
8193	Error	<i>The OvrrdInstRtId value that was provided is not valid.</i>

Error ID	Category	Description
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

### CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Msg* is sent to indicate that a mailing activity is created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>
8132	Warning	<i>CRMEventRecv is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Note</ElemCanocVal>
      <ElemCanocValDesc>Note Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRMActInfoRec (Required)

The `CRMActInfoRec` complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8023	Error	Msg, Note	<i>CRMActInfoRec is required.</i>

## CRMActDt (Optional)

This element represents the date that the activity occurred.

## ActCmnt (Required)

This element represents any comments for the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

## ActExpDt (Optional)

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8133	Warning	Msg, Note	<i>The date you entered was prior to today's date.</i>

## PurpCode (Optional)

This element represents the purpose of the mailing activity.

## Response

The service provider (Synapsys) returns the `CRMActAdd` response message to the service consumer, which contains the following simple elements.

### CRMActId

This element represents the unique ID assigned to the activity that has been added.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRM Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActSrch

The CRM activity search service returns all activities for a particular **InstRtid**, based on specified filter criteria. The request provides the following filters:

- **CRMActType** (required)
- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the CRMCustSrchrq\_MType message containing the required element **CRMActType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

## CRM Activity Search Request

CRMActSrchrS\_MType

The service provider sends the CRMActSrchrS\_MType message containing an echo of the request plus CRMActSrchrArray.

## Request

The third-party consumer forwards the CRMActSrchr request message to the service provider.

The element **CRMActType** and at least one of the additional following elements contained within the CRMActSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMActSrchr service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Msg* is sent to indicate that a mailing activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8028	Error	<i>CRMActType is required.</i>

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

## AcctType (Required)

This element represents a valid deposit, loan, or additional service application number

within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

### **CustId (Optional)**

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **TaxId (Optional)**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

## StartDt (Optional)

This optional element designates the starting point used for searching activities based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available activities that have an added date that is less than the specified **EndDt**.

## EndDt (Optional)

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

## Response

The service provider (Synapsys) returns the `CRMActSrch` response message to the service consumer, which returns a list of activity records that meet the specified search criteria.

The following arrays are contained within the `CRMActSrch` response message.

### CRMActSrchArray

This element returns an array of responses for the activity search and includes the `CRMActSrchRec` complex element for each activity record returned.

### CRMActSrchRec

The `CRMActSrchRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### CRMActType

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

### **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

### **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **CRMActDt**

This element represents the date the mailing date.

### **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **ActCmnt**

This element represents any comments for the activity.

### **CRMActRmk**

This element represents the purpose of the activity.

## ActCrtTimeDt

This element represents the date and time that the activity was added.

# CRM Meeting Activity Services

Synapsys has messaging services for the addition, search, inquiry, and modification of meeting activity information on service providers.

## CRM Activity Add

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMActAdd**

The CRM activity add service allows the service consumer to add an activity into the Synapsys database. The consumer must provide the following:

- A unique customer, which can be identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one element exists on the request, the customer identified is based on the combined effect of the elements (i.e., *and* operator). Each added element value further restricts the client that is identified.

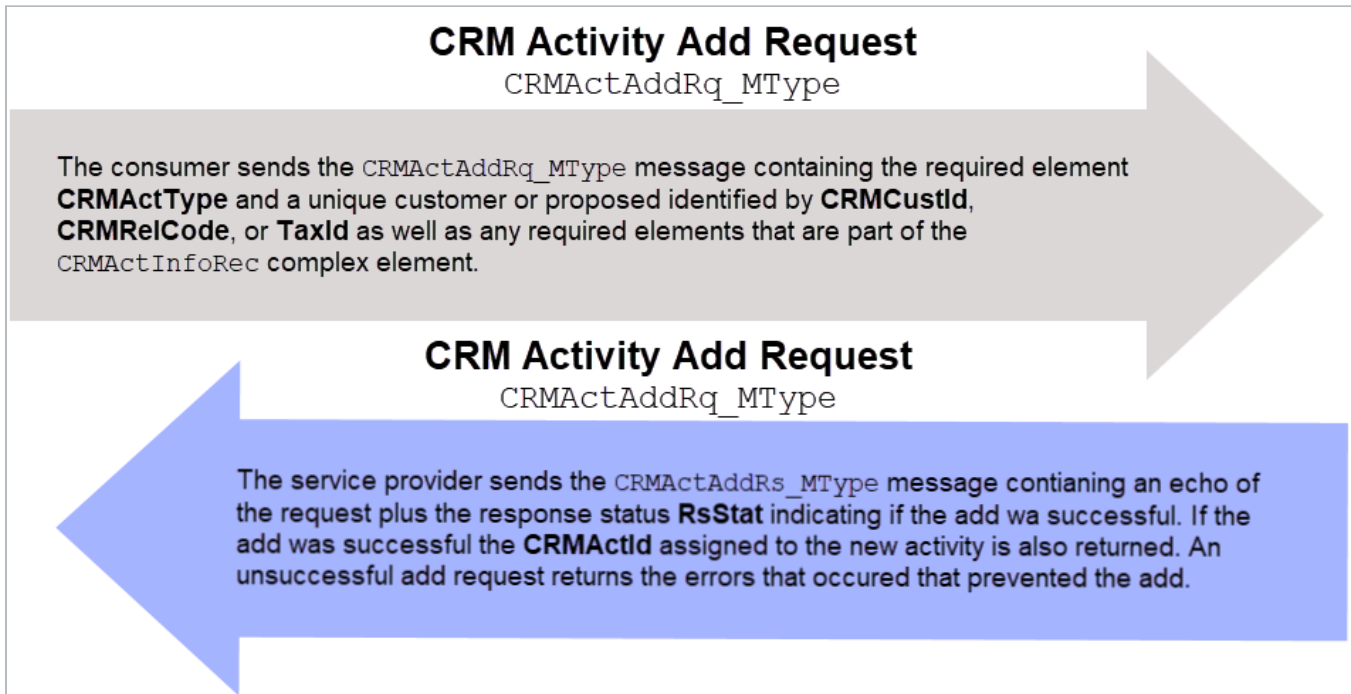
- Any required elements that are part of the `CRMActInfoRec` complex element for the activity.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the CRMActAdd request message to the service provider.

The following general errors or warnings may occur with the CRMActAdd service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8107	Fault	The officer permission AllowActivitiesCreate is set to False.
8196	Error	The officer permission AllowRelEx is set to False.

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMEventAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMActAdd` request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo/></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>

## CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.</i>

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	The combination of CustId, CRMRelcode, and TaxId is not a valid or unique client in the Synapsys database.
8192	Error	The associate sending the request cannot view the client or add/modify events and activities for them.

### CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Meet* is sent to indicate that a mailing activity is created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	CRMActType is invalid.
8027	Error	The value provided is not yet supported by this service.
8028	Error	CRMActType is required.

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>Meet</ElemCanocVal>
        <ElemCanocValDesc>Meeting Activity</ElemCanocValDesc>
        . . .
      </ElemCanocRec>
    </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## CRMActInfoRec (Required)

The `CRMActInfoRec` complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8023	Error	<i>CRMActInfoRec is required.</i>

## CRMActDt (Optional)

This element represents the date that the activity occurred.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8171	Error	<i>CRMActDt is invalid.</i>

## CRMActTime (Optional)

This element represents the time that the activity occurred.

## CRMOffCodeText (Optional)

This element represents the affiliation that the **CRMOffCode** has with the activity.

Canonical values are:

- *AttendingOfficer*
- *AttendingOther*

Passing **JHANull** = *True* on this element has no effect.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>

### **CRMOffCode (Optional)**

This element represents the associate who is assigned to the activity.

When **CRMOffCodeText** = *AttendingOther*, this element allows for a maximum of 250 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

### **CRMOffDesc (Optional)**

This element represents the note for the associate who is affiliated with the activity.

This element allows for a maximum of 25 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### **ActCmnt (Optional)**

This element represents any comments for the activity.

### **PurpCode (Required)**

This element contains the purpose of the meeting.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8170	Error	<i>PurpCode is required.</i>

### **CRMActSumCode (Required)**

This element indicates the result of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8177	Error	<i>CRMActSumCode is invalid.</i>
8178	Error	<i>CRMActSumCode is required.</i>

### MeetLocCode (Optional)

This element represents the location that a meeting was held.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### ActExpDt (Optional)

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>

### CRMEventId (Required)

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventType*, the **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, the **CanocValTxt** indicates the date that the event was added in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, the **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *CEventCrtOffDesc*, the **CanocValTxt** indicates the officer who created the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, the **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

|SvcDictInfoRec>
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMEventType (Required)

This element indicates the type of event to be added.

The value *Meet* is sent to indicate that a service event is added.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CustCon*, the **CanocValTxt** indicates a contact event.
  - When **CanocValDetail** = *Incen*, the **CanocValTxt** indicates an incentive event.
  - When **CanocValDetail** = *Sales*, the **CanocValTxt** indicates a sales event.
  - When **CanocValDetail** = *Svc*, the **CanocValTxt** indicates a service event.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### MeetStartTimeDt (Optional)

This element represents the starting date and time of the meeting activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

### MeetEndTimeDt (Optional)

This element represents the end date and time of the meeting.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## CRAMeetType (Optional)

This element indicates whether this is a CRA meeting.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMActAdd` response message to the service consumer which contains the following simple elements.

### CRMActId

This element represents the unique ID assigned to the activity that has been added.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRM Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActInq

The CRM activity inquiry service returns element details for a specific activity. The **CRMActId** (activity identification) element and **CRMActType** (activity type) element are both required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

## CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the CRMActSrchrq\_MType message containing the required element **CRMActType** and at least one of the optional search elements: **Accountid**, **Custid**, **Taxid**, **StartDate**, or **EndDate**.

## CRM Activity Search Response

CRMActSrchrS\_MType

The service provider sends the CRMActSrchrS\_MType message containing an echo of the request CRMActSrchrArray.

## CRM Activity Inquiry Request

CRMActInqrq\_MType

The consumer sends the CRMActInqrq\_MType message containing the required elements **CRMActid** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqrS\_MType

The service provider sends the CRMActInqrS\_MType message containing an echo of the request plus CRMActInfoRec.

## Request

The third-party consumer forwards the CRMActInq request message to the service provider.

The following elements are contained within the CRMActInq request message and are necessary for Synapsys CRM Services.

Error Id	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### **CRMActType (Required)**

This element represents the type of Synapsys activity being modified.

The value *Meet* is sent to indicate that a meeting activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

### **CRMActId (Required)**

This element represents a specific activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8022	Error	<i>CRMActId is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Ver\_1

This element represents a version in the XML schema. If any elements are included below **Ver\_1**, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMActInq` response message to the service consumer which contains the following simple elements.

## ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## CRMActInqRec

The `CRMActInqRec` complex element contains a package of data related to a Synapsys

activity and includes the following arrays, simple elements, and complex elements.

### **CRMActInfoRec**

The `CRMActInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

#### **CRMActDt**

This element represents the date that the activity was added.

#### **ActCrtOffCode**

This element represents the code for the associate who created the activity.

#### **ActOffArray**

This element returns an array of associates related to the activity.

## CRMOffRec

## CRMOffRec

This element contains a collection of simple elements.

## CRMOffCodeText

## CRMOffCodeText

This element contains the attending level of additional associates attending the meeting.

Canonical values are:

- *Attending 1*
- *Attending 2*
- *Other*

## CRMOffCode

# CRMOffCode

This element represents the code of the associate that is affiliated with the activity.

# CRMOffDesc

# CRMOffDesc

This element represents the note for the associate attending the meeting.

## **ActCmnt**

This element represents any comments for the activity.

## **PurpCode**

This element represents the activity's purpose.

## **CRMActSumCode**

This element indicates the result of the activity.

## **MeetLocCode**

This element represents the location that a meeting was held.

## **ActExpDt**

This element represents the expiration date of the activity.

## **CRMRelEventInfo**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

# CRMEventId

# CRMEventId

This element represents the unique ID assigned to the event.

# CRMEventType

## CRMEventType

This element indicates the type of event.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

### **CRMActTime**

This element represents the time that the activity occurred.

### **Ver\_3**

This element represents a version in the XML schema. If any elements are included below **Ver\_3**, then this element must be present.

# MeetStartTimeDt

## MeetStartTimeDt

This element represents the start date and time of the meeting.

# MeetEndTimeDt

## MeetEndTimeDt

This element represents the end date and time of the meeting.

# CRAMeetType

## CRAMeetType

This element indicates whether this is a CRA meeting.

## **CRMActType**

This element represents the type of Synapsys activity being returned.

## **CRMActId**

This element represents the unique ID of the specific activity being returned.

## **CustId**

This element represents the customer's portfolio.

## **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

## **TaxId**

This element represents the Social Security Number or **TaxId** of the customer or prospective customer that the activity belongs to.

## **CRMEventId**

This element represents the unique ID assigned to the event.

## **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

## **Ver\_1**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **ActCrtTimeDt**

This element represents the date and time the meeting record was added.

## **Ver\_2**

This element represents a version in the XML schema. If any elements are included below

**Ver\_2**, then this element must be present.

### **PurpDesc**

This element represents the description of the meeting purpose.

### **MeetLocDesc**

This element represents the description of the meeting location.

### **CRMActSumDesc**

This element represents the description of the meeting result.

## **CRM Activity Modify**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActMod

The CRM activity modify service allows the service consumer to modify certain elements for a specific activity. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

The CRM activity modify service uses a typical exchange of *Mt<sub>type</sub>* messages to allow updates to the information for a specific activity, based on the activity ID. An activity inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element is obtained through a Service Dictionary Search request.

### **Message Flow**

## CRM Activity Inquiry Request

CRMActInqRq\_MType

The consumer sends the CRMActInqRq\_MType message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the CRMActSrchRs\_MType message containing an echo of the request CRMActSrchArray.

## CRM Activity Modify Request

CRMActModRq\_MType

The consumer sends the CRMActModRq\_MType message containing the required **CRMActId**, **CRMActType**, and **ActIntentKey** elements. Additionally, either the CRMActInfoRec complex element or **DIt** element must be included for the desired activity.

## CRM Activity Modify Response

CRMActModRs\_MType

The service provider sends the CRMActModRs\_MType message containing the response status **RsStat** indicating if the modification was successful. An unsuccessful modification request also returns the errors that occurred that prevented the modification.

## Request

The third-party consumer forwards the CRMActMod request message to the service provider.

The following general errors or warnings may occur with the **CRMActMod** service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8196	Error	The officer permission AllowRelEx is set to False.
8201	Error	The officer does not have permission to view an event with this EventCatCode.

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the ErrOvrRdInfoArray that they want to override when sending the CRMActMod request message. This array includes the complex element ErrOvrRd, which contains the following simple elements.

#### ErrCode

This element represents a valid error code that pertains to CRMActMod request message.

The following error codes are valid for this request message.

Error Id	Category	Description
8119	Fault	Officer requesting does not have sufficient privileges to delete.
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActType (Required)

This element represents the type of Synapsys activity being returned.

The value *Meet* is sent to indicate that a meeting activity is being requested.

The `MsgRecInfoArray` in the response may contain the following items related to this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

## CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8021	Error	<i>CRMActId is invalid.</i>
8022	Error	<i>CRMActId is required.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## CRMActInfoRec (Required)

The CRMActInfoRec complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8023	Error	<i>CRMActInfoRec is required.</i>

## CRMActDt (Optional)

This element represents the date that the activity was created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8171	Error	<i>CRMActDt is invalid.</i>
8172	Error	<i>The officer is not the Officer Added and cannot edit CRMActDt.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## ActOffArray (Optional)

This array is a collection of associates who can be associated with the event and contains the complex `CRMOffRec` element.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>
8188	Error	<i>A maximum of 2 AttendingOfficers and 1 AttendingOther are allowed on Meeting Activities.</i>

## CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText (Required)

# CRMOffCodeText (Required)

This element represents the affiliation that the **CRMOffCode** has with the event.

Canonical values are:

- *AttendingOfficer*
- *AttendingOther*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>

Error ID	Category	Description
8041	Error	<i>CRMOffCodeText is required.</i>
8065	Error	<i>JHANull is not supported for element.</i>

## CRMOffCode (Required)

## CRMOffCode (Required)

This element represents the code of the associate that is affiliated with the activity.

When **CRMOffCodeText** = *AttendingOther*, this element allows for a maximum of 250 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

## CRMOffDesc

## CRMOffDesc

This element represents the name of the associate that is affiliated with the activity.

This element allows for a maximum of 25 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## Ver\_1 (Required – Conditional)

## Ver\_1 (Required – Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8135	Error	<i>The version tag is required in order to use subsequent elements.</i>

### **ActCmnt (Optional)**

This element represents any comments for the activity.

Comments that are sent are appended to existing comments.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

### **PurpCode (Required)**

This element represents the purpose of the meeting activity.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8180	Error	<i>The officer is not the Officer Added and cannot edit PurpCode.</i>

### **CRMActSumCode (Required)**

This element indicates the result of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8177	Error	<i>CRMActSumCode is invalid.</i>
8181	Error	<i>The officer is not the Officer Added and cannot edit CRMActSumCode.</i>

### **MeetLocCode**

This element represents the location that a meeting was held.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>

### **ActExpDt**

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>
8174	Error	<i>The officer is not the Officer Added and cannot edit ActExpDt.</i>

### **Ver\_2**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **CRMRelEventInfo**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### **CRMEventId (Required)**

This element represents a unique ID of a valid event that is related to the meeting activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEvent Type*, the **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, the **CanocValTxt** indicates the date that the event was added in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, the **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventCrtOffDesc*, the **CanocValTxt** indicates the officer who created the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, the **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMEventType (Required)

This element indicates the type of event to be searched.

The values *Svc* (service), *Sale*, *CustCon* (contact), and *Incen* (incentive) are sent to indicate the type of event being requested.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8033	Error	<i>CRMEventType is invalid.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CustCon*, the **CanocValTxt** indicates a contact event.
  - When **CanocValDetail** = *Incen*, the **CanocValTxt** indicates an incentive event.
  - When **CanocValDetail** = *Sales*, the **CanocValTxt** indicates a sales event.
  - When **CanocValDetail** = *Svc*, the **CanocValTxt** indicates a service event.

```

<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## CRMActTime

This element represents the time that the meeting occurred.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8183	Error	<i>The officer is not the Officer Added and cannot edit CRMActTime.</i>

## MeetStartTimeDt (Optional)

This element represents the starting date and time of the meeting activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>

## MeetEndTimeDt (Optional)

This element represents the end date and time of the meeting.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>

## CRAMeetType (Optional)

This element indicates whether this is a CRA meeting.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>

## Dlt

This element represents the desire for deletion of the specified event.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>

## Response

The service provider (Synapsys) returns the `CRMActMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActSrch

The CRM activity search service returns all activities for a particular **InstRtId**, based on specified filter criteria. The request provides the following filters:

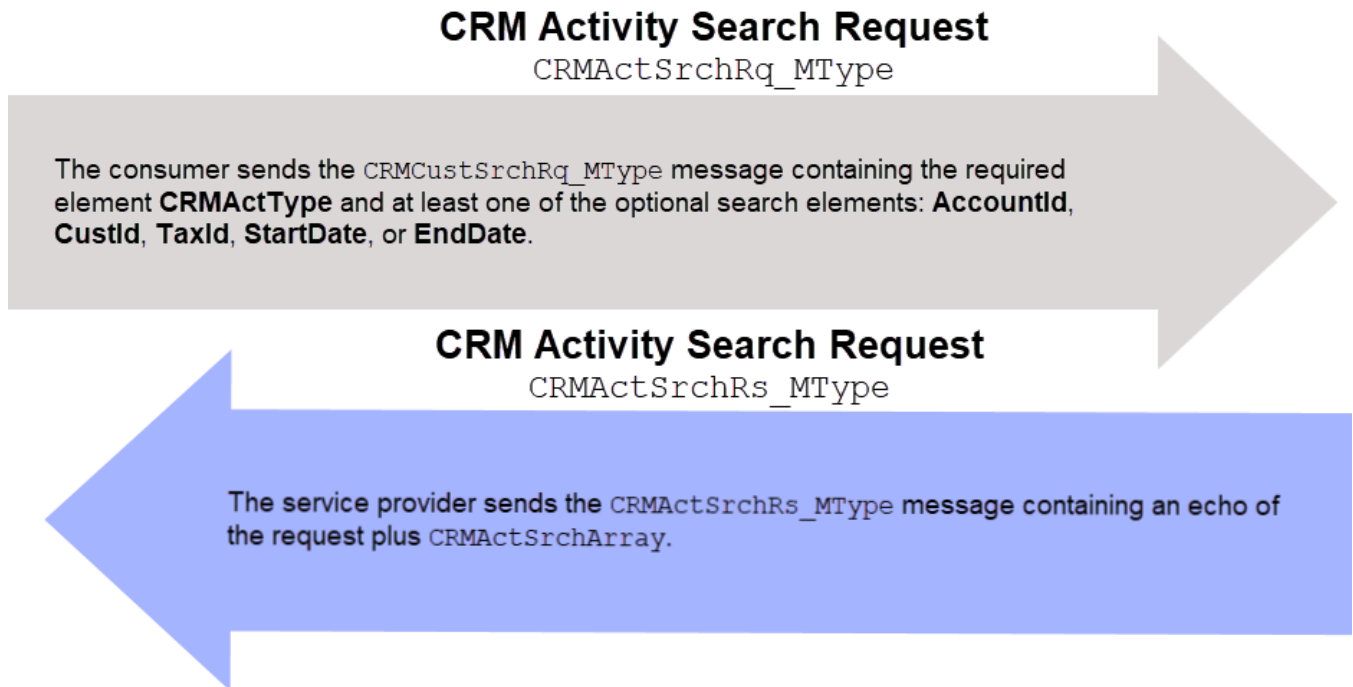
- **CRMActType** (required)
- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the CRMActSrchr request message to the service provider.

The element **CRMActType** and at least one of the additional following elements contained within the CRMActSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMActSrchr service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be</i>

Error ID	Category	Description
		<i>updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Meet* should be sent to indicate that a meeting activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8028	Error	<i>CRMActType is required.</i>

## AccountID (Optional)

This complex element contains the following elements.

### AcctID (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been</i>

Error Id	Category	Description
		<i>passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

### AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

### CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### **StartDt (Optional)**

This optional element designates the starting point used for searching activities based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available activities that have an added date that is less than the specified **EndDt**.

### **EndDt (Optional)**

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### **Response**

The service provider (Synapsys) returns the `CRMActSrch` response message to the service consumer, which returns a list of activity records that meet the specified search criteria.

The following arrays are contained within the `CRMActSrch` response message.

### **CRMActSrchArray**

This element returns an array of responses for the activity search and includes the `CRMActSrchRec` complex element for each activity record returned.

### **CRMActSrchRec**

The `CRMActSrchRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

## **CRMActType**

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

## **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

## **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CRMActDt**

This element represents the start date.

## **CRMActTime**

This element represents the start time.

## **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

#### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

#### **ActCmnt**

This element represents any comments for the activity.

#### **CRMActRmk**

This element represents the purpose of the activity.

#### **ActCrtTimeDt**

This element represents the date and time that the activity was added.

## **CRM Message Activity Services**

Synapsys has messaging services for the addition, inquiry, and modification of message activity information on service providers.

### **CRM Activity Add**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActAdd

The CRM activity add service allows the service consumer to add an activity into the Synapsys database. The consumer must provide the following:

- A unique customer, which can be identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one element exists on the request, the customer identified is based on the combined effect of the elements (i.e., *and* operator). Each added element value further restricts the client that is identified.

- Any required elements that are part of the `CRMActInfoRec` complex element for the

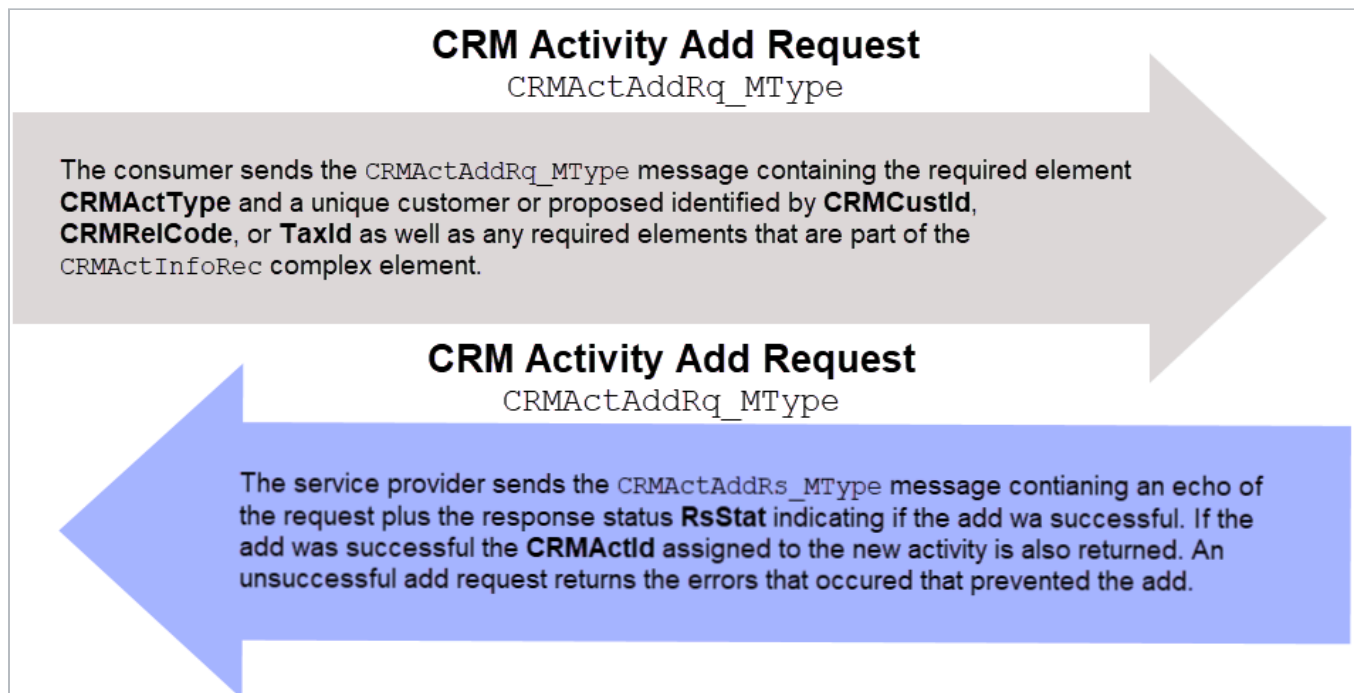
activity.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the `CRMActAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMActAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	CRMAcTType	Description
8107	Error	Message	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8131	Error	Message	<i>EnableMailing is set to false.</i>
8196	Error	Message	<i>The officer permission AllowRelEx is set to False.</i>

### ErrorOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrorOvrRdInfoArray` that they want to override when sending the `CRMAcTAdd` request message. This array includes the complex element `ErrorOvrRd` which contains the following simple elements.

### ErrorOvrRd (Optional)

This element contains a package of data related to errors that the consumer may override and includes the following simple elements.

### ErrCode (Optional)

This element represents a valid error code that pertains to the `CRMAcTAdd` request message.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMAcTType	Description
8007	Warning	Message	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

## ElemCanocVal.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActType (Required)

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in

### ElemCanocVal.

- When **ElemCanocVal** = *Msg*, the **ElemCanocValDesc** displays *Mailing Activity*.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Msg</ElemCanocVal>
      <ElemCanocValDesc>Mailing Activity</ElemCanocValDesc>
    . . .
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

### CRMActInfoRec (Required)

The CRMActInfoRec complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8023	Error	Message	<i>CRMActInfoRec is required.</i>

### CRMActDt (Optional)

This element represents the date that the activity was added.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8171	Error	<i>CRMActDt is invalid.</i>

## ActCmnt

This element contains all comments that are on the activity.

### Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### PurpCode (Required)

This element represents the activity's purpose.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8170	Error	<i>PurpCode is required.</i>

### ActExpDt (Optional)

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>

### Ver\_2 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## CRMRelEventInfo (Required)

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

# CRMEventId (Required)

## CRMEventId (Required)

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventType`, the **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventDt`, the **CanocValTxt** indicates the date that the event was added in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventDesc`, the **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = `EventCrtOffDesc`, the **CanocValTxt** indicates the officer who created the event in **ElemCanocVal**.
  - When **CanocValDetail** = `EventStatDesc`, the **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStartDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

# CRMEventType (Required)

## CRMEventType (Required)

This element indicates the type of event to be modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **ElemCanocVal** = *CustCon*, the **ElemCanocValDesc** indicates a contact event.
  - When **ElemCanocVal** = *Incen*, **ElemCanocValDesc** indicates an incentive event.
  - When **ElemCanocVal** = *Sale*, **ElemCanocValDesc** indicates a sales event.
  - When **ElemCanocVal** = *Svc*, **ElemCanocValDesc** indicates a service event.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### Ver\_3 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Ver\_4 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMActAdd` response message to the service consumer which contains the following simple elements.

### CRMActId

This element represents the unique ID of the specific activity being returned.

### RsStat

This element specifies the status of the add request.

This element specifies the status of the add request. Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in **RsStat**.
  - When **ElemCanocVal** = *Success*, then **ElemCanocValDesc** = *Success*.
  - When **ElemCanocVal** = *Fail*, then **ElemCanocValDesc** = *Fail*.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

# CRM Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActInq

The CRM activity inquiry service returns element details for a specific activity. The **CRMActId** (activity identification) element and **CRMActType** (activity type) element are both required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of *Mtype* messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the `CRMCustSrchrq_MType` message containing the required element **CRMActType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

### CRM Activity Search Response

CRMActSrchrS\_MType

The service provider sends the `CRMActSrchrS_MType` message containing an echo of the request `CRMActSrchrArray`.

### CRM Activity Inquiry Request

CRMActInqrq\_MType

The consumer sends the `CRMActInqrq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

### CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the `CRMActInqRs_MType` message containing an echo of the request plus `CRMActInfoRec`.

## Request

The third-party consumer forwards the `CRMActInq` request message to the service provider.

### AuthenUsrCred (Optional)

This complex element represents the authentication of the end-user credentials in the form of a WS Security Element. It contains a single SAML V2.0 Assertion.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### CRMActType (Required)

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>

Error Id	Category	Description
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

## CRMActId (Required)

This element represents the unique ID of the specific activity being returned.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8022	Error	<i>CRMActId is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMActInq` response message to the service consumer which contains the following simple elements.

### ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

### ActIntentKey

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

### CRMActInqRec

The `CRMActInqRec` complex element contains a package of data related to a Synapsys activity and includes the following arrays, simple elements, and complex elements.

### CRMActInfoRec

The `CRMActInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### CRMActDt

This element represents the date that the activity was added.

### **ActCrtOffCode**

This element represents the code for the associate who created the activity.

### **ActCmnt**

This element represents any comments for the activity.

### **Ver\_1**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **PurpCode**

This element represents the activity's purpose.

### **ActExpDt**

This element represents the expiration date of the activity.

### **Ver\_2**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **CRMRelEventInfo**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

## CRMEventId

## CRMEventId

This element represents a specific event within the Synapsys database.

## CRMEventType

# CRMEventType

This element indicates the type of event to be searched.

## Ver\_1

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Ver\_3

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Ver\_4

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## CRMActType

This element represents the type of Synapsys activity being searched.

## CRMActId

This element represents the unique ID assigned to the Synapsys activity.

## CustId

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

## CRMRelCode

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

## **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

## **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

## **CRMActStatDesc**

This element represents the descriptive value of the status that is associated with the activity.

## **ActCrtTimeDt**

This element represents the date and time that the activity was added.

## **Ver\_2**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **PurpDesc**

This element represents the description of the message purpose.

## **Ver\_3**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

# **CRM Activity Modify**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActMod

The CRM activity modify service allows the service consumer to modify certain elements for a specific activity. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

The CRM activity modify service uses a typical exchange of `Mtype` messages to allow updates to the information for a specific activity, based on the activity ID. An activity inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## **Message Flow**

## CRM Activity Inquiry Request

CRMActInqRq\_MType

The consumer sends the `CRMActInqRq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the `CRMActSrchRs_MType` message containing an echo of the request `CRMActSrchArray`.

## CRM Activity Modify Request

CRMActModRq\_MType

The consumer sends the `CRMActModRq_MType` message containing the required **CRMActId**, **CRMActType**, and **ActIntentKey** elements. Additionally, either the `CRMActInfoRec` complex element or **DIt** element must be included for the desired activity.

## CRM Activity Modify Response

CRMActModRs\_MType

The service provider sends the `CRMActModRs_MType` message containing the response status **RsStat** indicating if the modification was successful. An unsuccessful modification request also returns the errors that occurred that prevented the modification.

## Request

The third-party consumer forwards the `CRMActMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMActMod` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	CRMActType	Description
8124	Fault	Message	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8196	Error	Message	<i>The officer permission AllowRelEx is set to False.</i>
8201	Error	Message	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### **ErrorOvrRdInfoArray (Optional)**

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMActMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### **ErrOvrRd (Optional)**

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

### **ErrCode (Optional)**

This element represents a valid error code that pertains to `CRMActMod` request message.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8007	Warning	Message	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the

Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesView is set to False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActType (Required)

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **ElemCanocVal** = *Msg*, the **ElemCanocValDesc** displays *Mailing Activity*.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Msg</ElemCanocVal>
      <ElemCanocValDesc>Mailing Activity</ElemCanocValDesc>
      . . .
    </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### CRMActId (Required)

This element represents the unique ID of the specific activity being returned.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8021	Error	<i>CRMActId is invalid.</i>
8022	Error	<i>CRMActId is required.</i>

### ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<b>ActIntentKey</b> is required.

### CRMActInfoRec (Optional)

The `CRMActInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### CRMActDt (Optional)

This element represents the date that the activity occurred.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8171	Error	<i>CRMActDt is invalid.</i>
8172	Error	<i>The officer is not the Officer Added and cannot edit CRMActDt.</i>

### ActCmnt (Optional)

This element represents any comments for the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

### Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### PurpCode (Optional)

This element represents the activity's purpose.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8180	Error	<i>The officer is not the Officer Added and cannot edit PurpCode.</i>

### ActExpDt (Optional)

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>
8174	Error	<i>The officer is not the Officer Added and cannot edit ActExpDt.</i>

### Ver\_2 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following

this element, then this element must be present.

### CRMRelEventInfo (Optional)

The CRMRelEventInfo complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### CRMEventId (Required - Conditional)

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the SvcDictInfoArray of the Service Dictionary Search response for this element.

- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventType*, the **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, the **CanocValTxt** indicates the date that the event was added in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, the **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventCrtOffDesc*, the **CanocValTxt** indicates the officer who created the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, the **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>EV12345678</ElemCanocVal>
      <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>CRMEventType</CanocValDetail>
          <CanocValTxt>Sales</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>CRMEventDt</CanocValDetail>
          <CanocValTxt>01/15/2019</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>CRMEventDesc</CanocValDetail>
          <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventCrtOffDesc</CanocValDetail>
          <CanocValTxt>John Doe</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>EventStatDesc</CanocValDetail>
          <CanocValTxt>New Event</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### CRMEventType (Required - Conditional)

This element indicates the type of event to be modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **ElemCanocVal** = *CustCon*, the **ElemCanocValDesc** indicates a contact event.
  - When **ElemCanocVal** = *Incen*, **ElemCanocValDesc** indicates an incentive event.
  - When **ElemCanocVal** = *Sale*, **ElemCanocValDesc** indicates a sales event.
  - When **ElemCanocVal** = *Svc*, **ElemCanocValDesc** indicates a service event.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### Ver\_3 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### Ver\_4 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### DI1 (Optional)

This element represents the deletion of the specified activity.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>true</ElemCanocVal>
        <ElemCanocValDesc>true</ElemCanocValDesc>
      </ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>>false</ElemCanocVal>
        <ElemCanocValDesc>>false</ElemCanocValDesc>
      </ElemCanocRec>
    . . .
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `CRMActMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the add request.

This element specifies the status of the add request. Canonical values are:

- *Success*
- *Fail*

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value that is returned in **RsStat**.
  - When **ElemCanocVal** = *Success*, then **ElemCanocValDesc** = *Success*.
  - When **ElemCanocVal** = *Fail*, then **ElemCanocValDesc** = *Fail*.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

### Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

# CRM Note Activity Services

Synapsys has messaging services for the addition, search, inquiry, and modification of note activity information on service providers.

## CRM Activity Add

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMActAdd**

The CRM activity add service allows the service consumer to add an activity into the Synapsys database. The consumer must provide the following:

- A unique customer, which can be identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one element exists on the request, the customer identified is based on the combined effect of the elements (i.e., *and* operator). Each added element value further restricts the client that is identified.

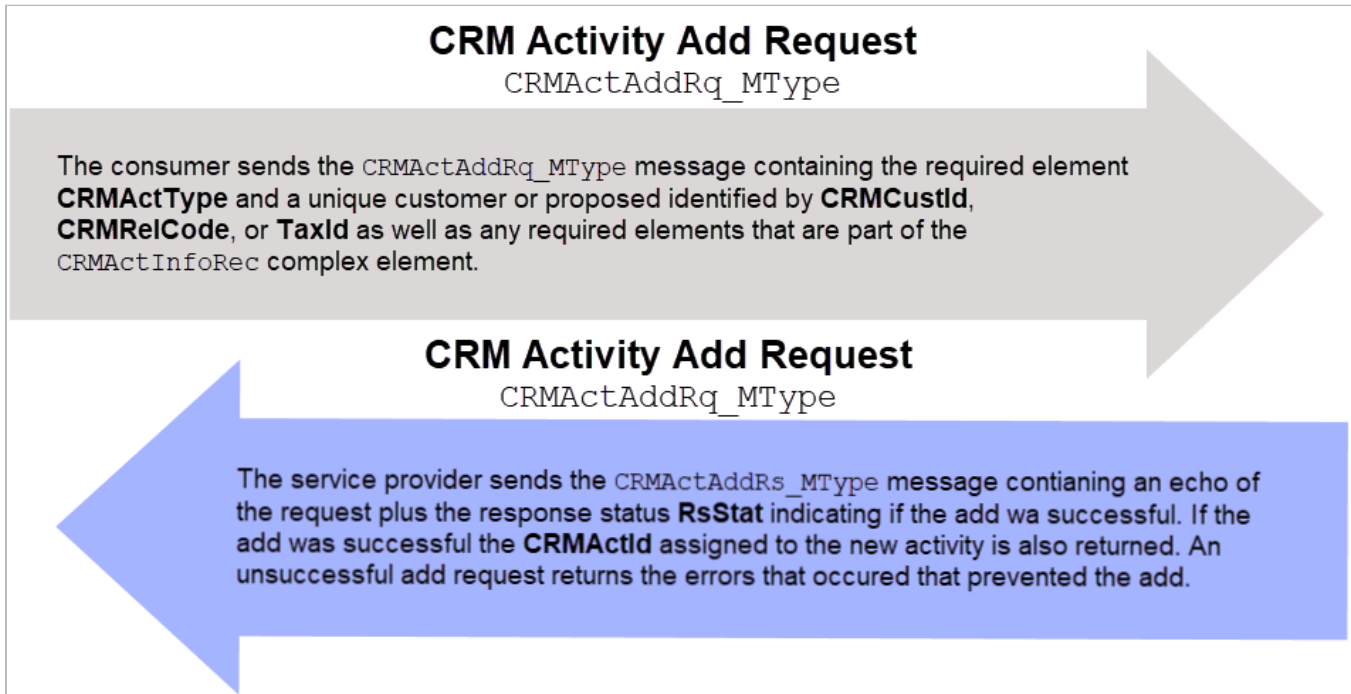
- Any required elements that are part of the `CRMActInfoRec` complex element for the activity.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the CRMActAdd request message to the service provider.

The following general errors or warnings may occur with the CRMActAdd service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	CRMActType	Description
8107	Fault	Note	The officer permission AllowActivitiesCreate is set to False.
8134	Error	Note	EnableNotes is set to false.
8196	Error	Note	The officer permission AllowRelEx is set to False.

## ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMActAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMActAdd` request message.

The following error codes are valid for this request message.

Error Id	Category	CRMActType	Description
8107	Fault	Note	<i>The officer permission AllowActivitiesCreate is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8007	Warning	Note	<i>The ErrCode is invalid.</i>

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

**NOTE**

For Symitar only, this element may represent the **MBRNumber**.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>
8193	Error	<i>The OvrrdInstRtId value that was provided is not valid.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

**CRMRelCode (Optional)**

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	The elements provided did not result in a valid or unique client in the Synapsys database.
8192	Error	The associate sending the request cannot view the client or add/modify events and activities for them.
8193	Error	The OvrrdInstRtId value that was provided is not valid.
8194	Error	More than one OvrrdInstRtId value was provided.

## CRMActType (Required)

This element represents the type of Synapsys activity to be added.

The value *Note* is sent to indicate that a note activity is created.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	CRMActType is invalid.
8027	Error	The value provided is not yet supported by

Error ID	Category	Description
		<i>this service.</i>
8028	Error	<i>CRMActType is required.</i>

### CRMActInfoRec (Required)

The CRMActInfoRec complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	CRMActType	Description
8023	Error	Note	<i>CRMActInfoRec is required.</i>

### CRMActDt (Optional)

This element represents the date that the activity occurred.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8171	Error	<i>CRMActDt is invalid.</i>

### ActCmnt (Required)

This element represents any comments for the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

### **PurpCode (Optional)**

This element represents the purpose of the mailing activity.

### **ActExpDt (Optional)**

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>

### **CRMRelEventInfo (Optional)**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### **CRMEventId (Optional) (Required when CRMEventType is Sent)**

This element represents the unique ID assigned to the event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view</i>

Error ID	Category	Description
		<code>an event with this EventCatCode.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **CRMEventType**.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventType*, then **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, then **CanocValTxt** indicates the date of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, then **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventCrtOffDesc*, then **CanocValTxt** indicates the officer that added the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, then **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### CRMEventType (Optional) (Required when CRMEventID is Sent)

This element represents the associated event's type.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMActAdd` response message to the service consumer, which contains the following simple elements.

### CRMActId

This element represents the unique ID assigned to the activity that has been added.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*

- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActInq

The CRM activity inquiry service returns element details for a specific activity. The **CRMActId** (activity identification) element and **CRMActType** (activity type) element are both required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the `CRMCustSrchrq_MType` message containing the required element **CRMActType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

### CRM Activity Search Response

CRMActSrchrS\_MType

The service provider sends the `CRMActSrchrS_MType` message containing an echo of the request `CRMActSrchrArray`.

### CRM Activity Inquiry Request

CRMActInqrq\_MType

The consumer sends the `CRMActInqrq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

### CRM Activity Inquiry Response

CRMActInqrS\_MType

The service provider sends the `CRMActInqrS_MType` message containing an echo of the request plus `CRMActInfoRec`.

## Request

The third-party consumer forwards the `CRMActInq` request message to the service provider.

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMActInq` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being returned.

The value `Note` should be sent to indicate that a note activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

## CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8022	Error	<i>CRMActId is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Dlt* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMActInq` response message to the service consumer based on the **CRMActId** and **CRMActType** that was requested.

The following elements are contained within the `CRMActInq` response applicable for Synapsys CRM Services.

## **ActIntent**

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

## **ActIntentKey**

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

## **CRMActInqRec**

The `CRMActInqRec` complex element contains a package of data related to a Synapsys activity and includes the following arrays, simple elements, and complex elements.

## **CRMActInfoRec**

The `CRMActInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

## **CRMActDt**

This element represents the date that the activity was added.

## **ActCrtOffCode**

This element represents the code for the associate who created the activity.

## **ActCmnt**

This element contains all comments that are on the activity.

## **Ver\_1**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **ActExpDt**

This element represents the expiration date of the activity.

## **Ver\_2**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **CRMRelEventInfo**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

# CRMEventId

# CRMEventId

This element represents the unique ID assigned to the event.

# CRMEventType

# CRMEventType

This element represents the associated event's type.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

## **CRMActType**

This element represents the type of Synapsys activity being returned.

## **CRMActId**

This element represents a specific activity within the Synapsys database.

## **CustId**

This element represents the customer's portfolio.

## **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

## **TaxId**

This element represents the customer's Social Security Number or tax ID.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

## **CRMEventId**

This element represents the associated event's unique ID.

## **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

## **ActCrtTimeDt**

This element represents the date and time that the activity was added.

# **CRM Activity Modify**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActMod

The CRM activity modify service allows the service consumer to modify certain elements for a specific activity. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

The CRM activity modify service uses a typical exchange of *Mt* messages to allow updates to the information for a specific activity, based on the activity ID. An activity inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## **Message Flow**

## CRM Activity Inquiry Request

CRMActInqRq\_MType

The consumer sends the `CRMActInqRq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the `CRMActSrchRs_MType` message containing an echo of the request `CRMActSrchArray`.

## CRM Activity Modify Request

CRMActModRq\_MType

The consumer sends the `CRMActModRq_MType` message containing the required **CRMActId**, **CRMActType**, and **ActIntentKey** elements. Additionally, either the `CRMActInfoRec` complex element or **DIt** element must be included for the desired activity.

## CRM Activity Modify Response

CRMActModRs\_MType

The service provider sends the `CRMActModRs_MType` message containing the response status **RsStat** indicating if the modification was successful. An unsuccessful modification request also returns the errors that occurred that prevented the modification.

## Request

The third-party consumer forwards the `CRMActMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMActMod` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8185	Error	The officer does not have sufficient permissions to edit element.
8196	Error	The officer permission AllowRelEx is set to False.
8201	Error	The officer does not have permission to view an event with this EventCatCode.

## ErrOvrRdInfoArray

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMActMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrOvrRd

This element contains a package of data related to errors that the consumer may override. `ErrOvrRd` includes the following simple elements.

### ErrCode

This element represents a valid error code that pertains to `CRMActMod` request message

The following error codes are valid for this request message.

Error Id	Category	Description
8119	Fault	Officer requesting does not have sufficient privileges to delete.

Error Id	Category	Description
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActType (Required)

This element represents the type of Synapsys activity being returned.

The value *Note* is sent to indicate that a note activity is being modified.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>

Error ID	Category	Description
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Note</ElemCanocVal>
      <ElemCanocValDesc>Note Activity</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8021	Error	<i>CRMActId is invalid.</i>
8022	Error	<i>CRMActId is required.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## CRMActInfoRec

The CRMActInqRec complex element contains a package of data related to a Synapsys activity and includes the following arrays, simple elements, and complex elements.

## CRMActDt (Optional)

This element represents the date that the activity was created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8171	Error	<i>CRMActDt is invalid.</i>
8172	Error	<i>The officer is not the Officer Added and cannot edit CRMActDt.</i>

## ActCmnt (Optional)

This element represents any comments for the activity.

Comments that are sent are appended to existing comments. The length is unlimited.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

### **ActExpDt (Optional)**

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>
8174	Error	<i>The officer is not the Officer Added and cannot edit ActExpDt.</i>

### **Ver\_2**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **Dlt (Optional)**

This element represents the deletion of the specified event.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>

Error Id	Category	Description
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMRelEventInfo (Optional)

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### CRMEventId (Optional) (Required when CRMEventType is Sent)

This element represents a unique ID of the event that the note activity is associated with.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

Error ID	Category	Description
8185	Error	<i>The officer does not have sufficient permissions to edit element.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **CRMEventType**.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventType*, then **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, then **CanocValTxt** indicates the date of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, then **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventCrtOffDesc*, then **CanocValTxt** indicates the officer that added the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, then **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### CRMEventType (Optional) (Required when CRMEventID is Sent)

This element represents the associated event's type.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Svc</ElemCanocVal>
      <ElemCanocValDesc>Service Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>CustCon</ElemCanocVal>
      <ElemCanocValDesc>Contact Event Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Sale</ElemCanocVal>
      <ElemCanocValDesc>Sales Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Incen</ElemCanocVal>
      <ElemCanocValDesc>Incentive Event</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## Response

The service provider (Synapsys) returns the `CRMActMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*

- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActSrch

The CRM activity search service returns all activities for a particular **InstRtid**, based on specified filter criteria. The request provides the following filters:

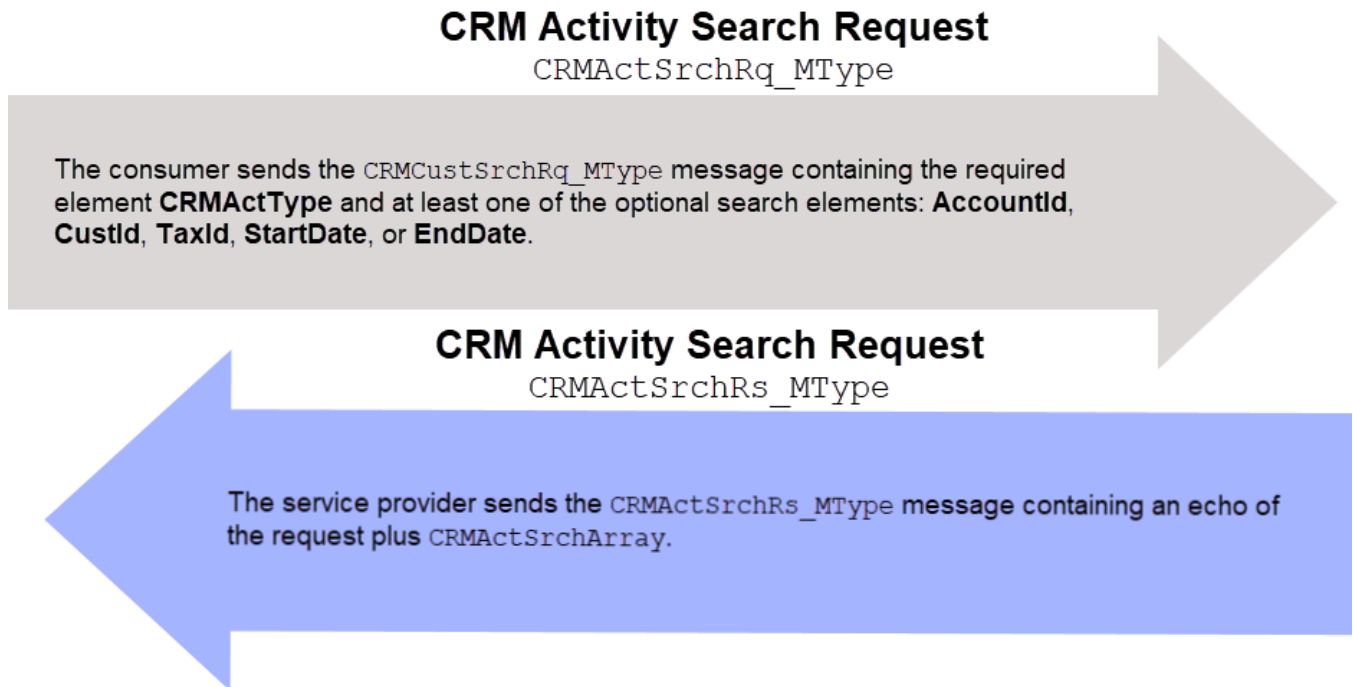
- **CRMActType** (required)
- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the CRMActSrchr request message to the service provider.

The element **CRMActType** and at least one of the additional following elements contained within the CRMActSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMActSrchr service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8069	Error	<i>For searches, at least one of the optional</i>

Error ID	Category	Description
		<i>parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Note* is sent to indicate that a note activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8028	Error	<i>CRMActType is required.</i>

## AccountId (Optional)

This complex element contains the following elements.

### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

### AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

### CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid**

attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### **StartDt (Optional)**

This optional element designates the starting point used for searching activities based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available activities that have an added date that is less than the specified **EndDt**.

### **EndDt (Optional)**

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

## **Response**

The service provider (Synapsys) returns the `CRMActSrch` response message to the service consumer, which returns a list of activity records that meet the specified search criteria.

The following arrays are contained within the `CRMActSrch` response message.

### **CRMActSrchArray**

This element returns an array of responses for the activity search and includes the `CRMActSrchRec` complex element for each activity record returned.

### **CRMActSrchRec**

The `CRMActSrchRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

## **CRMActType**

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

## **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

## **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CRMActDt**

This element represents the date set on the note.

## **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **ActCmnt**

This element represents any comments for the activity.

### **CRMActRmk**

This element represents the latest comment added to the note activity.

### **ActCrtTimeDt**

This element represents the date and time that the activity was added.

## **CRM Phone Activity Services**

Synapsys has messaging services for the addition, search, inquiry, and modification of phone activity information on service providers.

### **CRM Activity Add**

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMActAdd**

The CRM activity add service allows the service consumer to add an activity into the Synapsys database. The consumer must provide the following:

- A unique customer, which can be identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one element exists on the request, the customer identified is based on the combined effect of the elements (i.e., *and* operator). Each added element value further restricts the client that is identified.

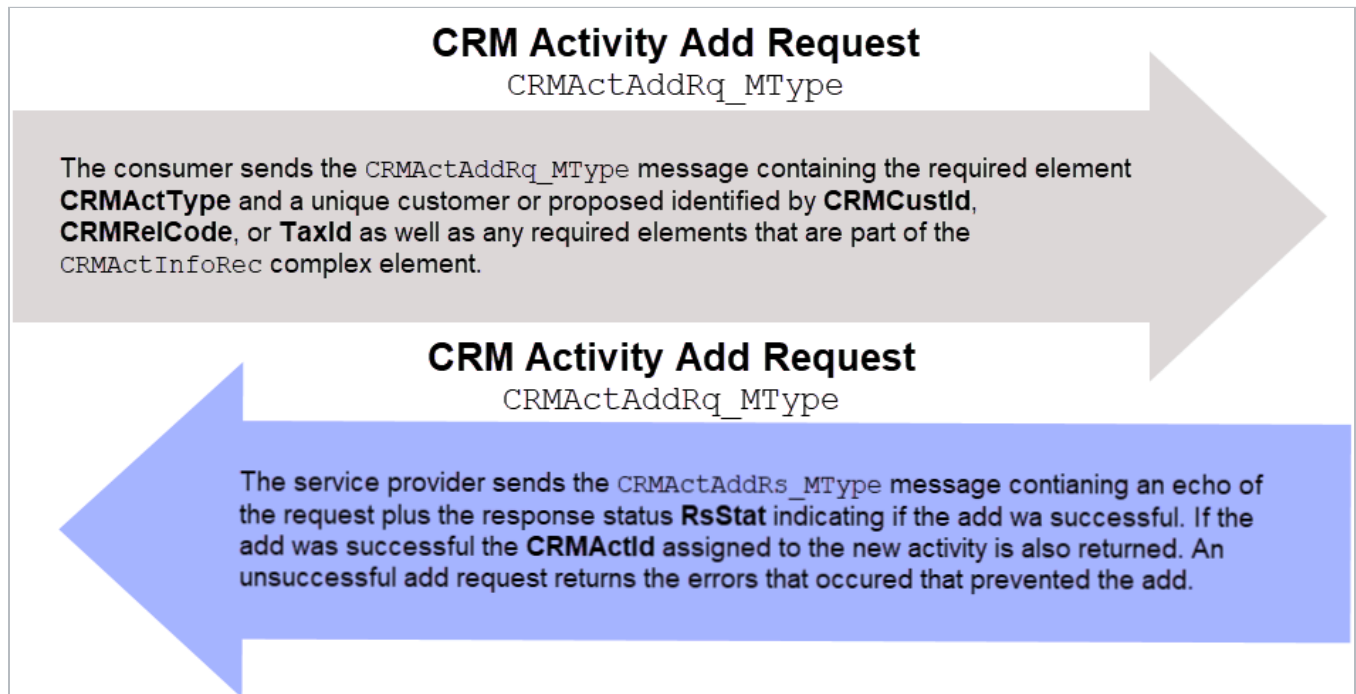
- Any required elements that are part of the `CRMActInfoRec` complex element for the activity.

The user submitting the Synapsys CRM Service request is identified on the activity as the associate who created the activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the `CRMActAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMActAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	CRMAcTType	Description
8107	Error	Phone	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8179	Error	Phone	<i>EnablePhoneLog is set to false.</i>
8196	Error	Phone	<i>The officer permission AllowRelEx is set to False.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMAcTAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### ErrCode

This element represents a valid error code that pertains to the `CRMAcTAdd` request message.

The following error codes are valid for this request message.

Error ID	Category	CRMAcTType	Description
8107	Error	Msg, Phone	<i>The officer permission AllowActivitiesCreate is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error ID	Category	CRMActType	Description
8007	Warning	Msg, Phone	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesCreate is set to False. </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

## CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

## CRMActType (Required)

This element represents the type of Synapsys activity being searched.

The value *Phone* is sent to indicate that a phone activity is created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- When **CanocValDetail** = *EnableFreeFormPhonePurpose*, then **CanocValTxt** contains *True* or *False*, indicating if a free form phone purpose appears.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Phone</ElemCanocVal>
      <ElemCanocValDesc>Phone Log Activity</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>EnableFreeFormPhonePurpose</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActInfoRec (Required)

The `CRMActInfoRec` complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8023	Error	<i>CRMActInfoRec is required.</i>

### **CRMActDt (Optional)**

This element represents the date that the activity occurred.

When **CRMActDt** is not provided, the date the request was received is used.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8171	Error	<i>CRMActDt is invalid.</i>

### **CRMActTime (Optional)**

This element represents the time at which the activity was created. When **CRMActTime** is not provided, the date that the request was received is used.

### **ActCmnt (Optional)**

This element represents any comments for the event.

### **PurpCode (Optional)**

This element contains the purpose of the meeting.

When **PurpCode** is not provided, the default value returned in the `SvcDictSrchRs` is used.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8170	Error	<i>PurpCode is required.</i>

Error Id	Category	Description
8176	Error	<i>PurpCode is invalid.</i>

### **CRMActSumCode (Required)**

This element indicates the result of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8177	Error	<i>CRMActSumCode is invalid.</i>
8178	Error	<i>CRMActSumCode is required.</i>

### **ActExpDt (Optional)**

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>

### **CRMRelEventInfo (Optional)**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### **CRMEventId (Optional) (Required when CRMEventType is Sent)**

This element represents a specific event within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **CRMEventId**.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventType*, then **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDt*, then **CanocValTxt** indicates the date of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *CRMEventDesc*, then **CanocValTxt** indicates the summary of the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventCrtOffDesc*, then **CanocValTxt** indicates the officer that added the event in **ElemCanocVal**.
  - When **CanocValDetail** = *EventStatDesc*, then **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### CRMEventType (Optional) (Required when CRMEventID is Sent)

This element indicates the type of event to be associated.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

Error Id	Category	Description
8129	Error	<i>This element is required.</i>

## CRMActTime (Optional)

This element represents the time that the activity occurred.

## MeetStartTimeDt

This element represents the starting date/time of the phone activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMActAdd` response message to the service consumer which contains the following simple elements.

### CRMActId

This element represents the unique ID assigned to the phone log activity that has been added.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRM Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActInq

The CRM activity inquiry service returns element details for a specific activity. The **CRMActId** (activity identification) element and **CRMActType** (activity type) element are both required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of *Mtype* messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Activity Search Request

CRMActSrchrq\_MType

The consumer sends the CRMActSrchrq\_MType message containing the required element **CRMActType** and at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDate**, or **EndDate**.

### CRM Activity Search Response

CRMActSrchrS\_MType

The service provider sends the CRMActSrchrS\_MType message containing an echo of the request CRMActSrchrArray.

### CRM Activity Inquiry Request

CRMActInqrq\_MType

The consumer sends the CRMActInqrq\_MType message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

### CRM Activity Inquiry Response

CRMActInqrS\_MType

The service provider sends the CRMActInqrS\_MType message containing an echo of the request plus CRMActInfoRec.

## Request

The third-party consumer forwards the `CRMActInq` request message to the service provider.

The following elements are contained within this request message and are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the `CRMActInq` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>

## AuthenUsrCred

This complex element represents the authentication of the end-user credentials in the form of a WS Security Element. It contains a single SAML V2.0 Assertion.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

## CRMActType (Required)

This element represents the type of Synapsys activity being returned.

The value `Phone` is sent to indicate a phone activity is being requested.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

### CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The `MsgRecInfoArray` in the response may contain the following items related to this element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8022	Error	<i>CRMActId is required.</i>

### ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMActInq` response message to the service consumer based on the **CRMActId** and **CRMActType** that was requested.

The following elements are contained within the `CRMActInq` response applicable for Synapsys CRM Services.

### ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

### CRMActInqRec

The `CRMActInqRec` complex element contains a package of data related to a Synapsys activity and includes the following arrays, simple elements, and complex elements.

### CRMActInfoRec

The `CRMActInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### CRMActDt

This element represents the date that the activity was added.

### **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ActCmnt**

This element represents any comments for the activity.

### **PurpCode**

This element represents the activity's purpose.

### **CRMActSumCode**

This element indicates the result of the activity.

### **ActExpDt**

This element represents the expiration date of the activity.

### **CRMRelEventInfo (Optional)**

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

## CRMEventId

## CRMEventId

This element represents the unique ID assigned to the event.

## CRMEventType

## CRMEventType

This element indicates the type of event to be searched.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

### **CRMActTime**

This element represents the time that the activity occurred.

### **CRMActType**

This element represents the type of Synapsys activity being returned.

### **CRMActId**

This element represents the unique ID of the specific activity being returned.

### **CustId**

This element represents the customer's portfolio.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### **CRMRelCode**

This element represents the customer's relcode1 (relationship code).

### **TaxId**

This element represents the customer's Social Security Number or tax ID.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

## **PurpDesc**

This element represents the purpose code description.

## **CRMActSumDesc**

This element represents the result of the activity.

## **ActCrtTimeDt**

This element represents the date and time the activity was created in Synapsys.

# **CRM Activity Modify**

**Container: TPG\_CustomerMaster.xsd**

## **Message: CRMActMod**

The CRM activity modify service allows the service consumer to modify certain elements for a specific activity. The **CRMActId**, **ActIntentKey**, and **CRMActType** elements are required on the modification request.

The CRM activity modify service uses a typical exchange of *Mt<sub>type</sub>* messages to allow updates to the information for a specific activity, based on the activity ID. An activity inquiry must always be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element is obtained through a Service Dictionary Search request.

## **Message Flow**

## CRM Activity Inquiry Request

CRMActInqRq\_MType

The consumer sends the `CRMActInqRq_MType` message containing the required elements **CRMActId** and **CRMActType** for the desired activity.

## CRM Activity Inquiry Response

CRMActInqRs\_MType

The service provider sends the `CRMActSrchRs_MType` message containing an echo of the request `CRMActSrchArray`.

## CRM Activity Modify Request

CRMActModRq\_MType

The consumer sends the `CRMActModRq_MType` message containing the required **CRMActId**, **CRMActType**, and **ActIntentKey** elements. Additionally, either the `CRMActInfoRec` complex element or **DIt** element must be included for the desired activity.

## CRM Activity Modify Response

CRMActModRs\_MType

The service provider sends the `CRMActModRs_MType` message containing the response status **RsStat** indicating if the modification was successful. An unsuccessful modification request also returns the errors that occurred that prevented the modification.

## Request

The third-party consumer forwards the `CRMActMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMActMod` service. Errors that pertain specifically to an element are listed with that element.

Error Id	CRMEventType	Description
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8124	Fault	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they want to override when sending the `CRMActMod` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

### ErrCode

This element represents a valid error code that pertains to the `CRMActMod` request message.

The following error codes are valid for this request message.

Error Id	Description
8124	<i>The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.</i>

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8107</ElemCanocVal>
      <ElemCanocValDesc>The officer permission AllowActivitiesView is set to False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>
```

## CRMActType (Required)

This element represents the type of Synapsys activity being modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8027	Error	<i>The value provided is not yet supported by this service.</i>
8028	Error	<i>CRMActType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- When **CanocValDetail** = *EnableFreeFormPhonePurpose*, then **CanocValTxt** contains *True* or *False*, indicating if a free form phone purpose appears.

```

<SvcDictInfoRec>
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Phone</ElemCanocVal>
      <ElemCanocValDesc>Phone Log Activity</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>EnableFreeFormPhonePurpose</CanocValDetail>
          <CanocValTxt>True</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

### CRMActId (Required)

This element represents a specific activity within the Synapsys database.

The value *Phone* is sent to indicate a phone activity should be modified.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8021	Error	<i>CRMActId is invalid.</i>
8022	Error	<i>CRMActId is required.</i>

### ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## CRMActInfoRec (Required when Dlt=False, Optional when Dlt=True)

This complex element contains the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8023	Error	<i>CRMActInfoRec is required.</i>

## CRMActDt (Optional)

This element represents the date that the activity was created.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8171	Error	<i>CRMActDt is invalid.</i>
8172	Error	<i>The officer is not the Officer Added and cannot edit CRMActDt.</i>

## ActCmnt (Optional)

This element represents any comments for the activity.

Comments that are sent are appended to existing comments.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

### PurpCode (Optional)

This element represents the activity's purpose.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8176	Error	<i>PurpCode is invalid.</i>
8180	Error	<i>The officer is not the Officer Added and cannot edit PurpCode.</i>

### CRMActSumCode (Optional)

This element indicates the result of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8177	Error	<i>CRMActSumCode is invalid.</i>
8181	Error	<i>The officer is not the Officer Added and cannot edit CRMActSumCode.</i>

### ActExpDt (Optional)

This element represents the expiration date of the activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8173	Error	<i>ActExpDt is invalid.</i>
8174	Error	<i>The officer is not the Officer Added and cannot edit ActExpDt.</i>

## CRMRelEventInfo (Optional)

The `CRMRelEventInfo` complex element contains a package of data related to a single Synapsys event that is associated with the activity.

### CRMEventId (Optional) (Required when CRMEventType is Sent)

This element represents the unique ID assigned to the event.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **CRMEventType**.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventType`, then **CanocValTxt** indicates the type of event in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventDt`, then **CanocValTxt** indicates the date of the event in **ElemCanocVal**.
  - When **CanocValDetail** = `CRMEventDesc`, then **CanocValTxt** indicates the summary of

the event in **ElemCanocVal**.

- When **CanocValDetail** = *EventCrtOffDesc*, then **CanocValTxt** indicates the officer that added the event in **ElemCanocVal**.
- When **CanocValDetail** = *EventStatDesc*, then **CanocValTxt** indicates the status of the event in **ElemCanocVal**.

```
<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>EV12345678</ElemCanocVal>
    <ElemCanocValDesc>EV12345678</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>CRMEventType</CanocValDetail>
        <CanocValTxt>Sales</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDt</CanocValDetail>
        <CanocValTxt>01/15/2019</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CRMEventDesc</CanocValDetail>
        <CanocValTxt>Sales Event generated from a Referral Activity</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventCrtOffDesc</CanocValDetail>
        <CanocValTxt>John Doe</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>EventStatDesc</CanocValDetail>
        <CanocValTxt>New Event</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>
```

### **CRMEventType (Optional) (Required when CRMEventID is Sent)**

This element indicates the type of event to be searched.

Canonical values are:

- *Svc* - Synapsys Service Events
- *Sale* - Synapsys Sales Events
- *CustCon* - Synapsys Contact Events
- *Incen* - Synapsys Incentive Events

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

### **CRMActTime (Optional)**

This element represents the time that the activity occurred.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8183	Error	<i>The officer is not the Officer Added and cannot edit CRMActTime.</i>

### **MeetStartTimeDt**

This element represents the starting date/time of the phone activity.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>
8183	Error	<i>The officer is not the Officer Added and cannot edit CRMActTime.</i>

### **Dlt (Optional)**

This element represents the deletion of the specified activity.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in **Dlt**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMActMod` response message to the service consumer, which contains the following simple elements.

## RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMActSrch

The CRM activity search service returns all activities for a particular **InstRtid**, based on specified filter criteria. The request provides the following filters:

- **CRMActType** (required)
- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)

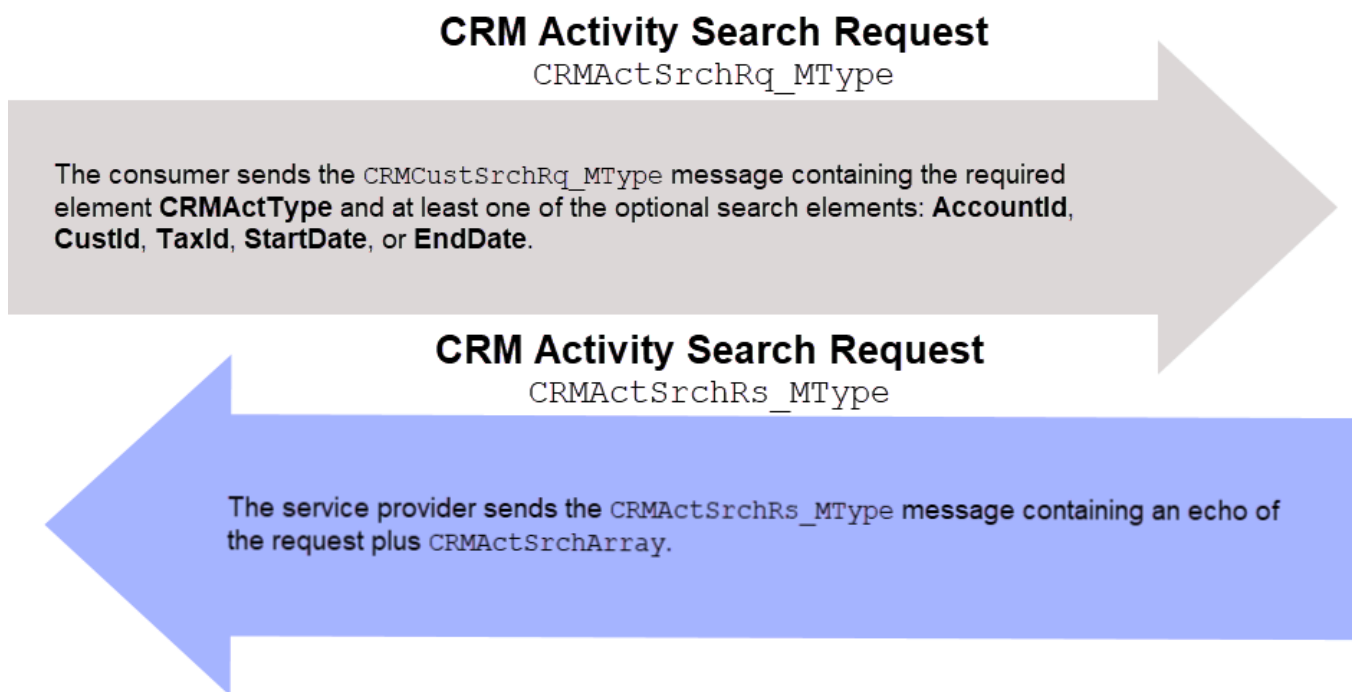
When more than one filter exists on the request, the resulting selection is based on the

combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the CRMActSrchr request message to the service provider.

The element **CRMActType** and at least one of the additional following elements contained within the CRMActSrchr request message are necessary for Synapsys CRM Services.

The following general errors or warnings may occur with the CRMActSrchr service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### **CRMActType (Required)**

This element represents the type of Synapsys activity being searched.

The following errors, warnings, or faults may occur with this element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8026	Error	<i>CRMActType is invalid.</i>
8028	Error	<i>CRMActType is required.</i>

### **AccountId (Optional)**

This complex element contains the following elements.

#### **AcctId (Optional)**

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

### AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

### CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtid**

attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrrdInstRtId value was provided.</i>

### **StartDt (Optional)**

This optional element designates the starting point used for searching events based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available events that have an added date that is less than the specified **EndDt**.

### **EndDt (Optional)**

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

### **Response**

The service provider (Synapsys) returns the `CRMActSrch` response message to the service consumer, which returns a list of activity records that meet the specified search criteria.

The arrays contained within the `CRMActSrch` response message are as follows.

### **CRMActSrchArray**

This element returns an array of responses for the activity search and includes the `CRMActSrchRec` complex element for each activity record returned.

### **CRMActSrchRec**

The `CRMActSrchRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

## **CRMActType**

This element indicates the type of activity.

Canonical values are:

- *Cmpgn* - Synapsys Campaign Activities
- *Meet* - Synapsys Meeting Activities
- *Msg* - Synapsys Mailing Activities
- *Phone* - Synapsys Phone Log Activities
- *Note* - Synapsys Note Activities

## **CRMActId**

This element represents the unique ID assigned to the Synapsys activity.

## **TaxId**

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CustId**

This element represents the portfolio of the customer whom the activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CRMActDt**

This element represents the call date.

## **CRMActTime**

This element represents the call time.

## **ActCrtOffCode**

This element represents the code for the associate who created the activity.

In a multibank environment, the **OvrrdInstRtid** attribute is supported.

### **ActCrtOffDesc**

This element represents the name of the associate who created the activity.

### **CRMActRmk**

This element represents the purpose of the activity.

### **ActCrtTimeDt**

This element represents the date and time that the activity was added.

## **CRM Referral Activity Services**

Synapsys has messaging services for the addition, search, inquiry, and modification of referral activity information on service providers.

### **CRM Referral Activity Add**

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMReferAdd

The CRM referral activity add service allows the service consumer to add referral activities into the Synapsys database. When the referral activity is added, a sales event is also created. The consumer must provide the following information:

- A unique customer identified by providing the following elements:
  - **CustId**
  - **CRMRelCode**
  - **TaxId**

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

- Any required elements that are part of the `CRMReferInfoRec` complex element for the referral activity.

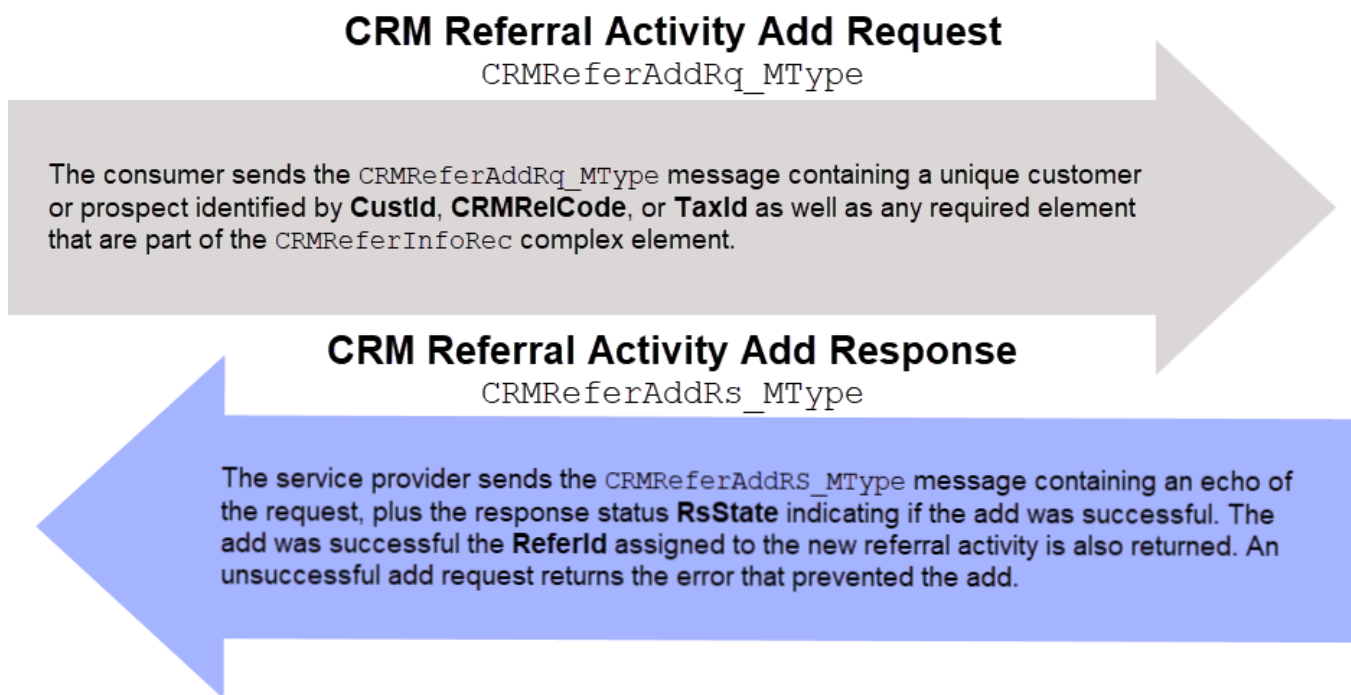
The user submitting the Synapsys CRM Service request is identified on the referral activity

as the associate who created the event.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the `CRMReferAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMReferAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8195	Error	<i>The financial institution has chosen not to enable Referral Activities.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the `ErrOvrRdInfoArray` that they wish to override when sending the `CRMReferAdd` request message. This array includes the complex element `ErrOvrRd`, which contains the following simple elements.

#### ErrCode

This element is a valid error code that pertains to the `CRMReferAdd` request message.

The following error codes are valid for this request message.

Error ID	Category	Description
8107	Fault	<i>The officer permission AllowActivitiesCreate is set to False.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8121	Fault	<i>The officer does not have sufficient privileges to set a Referral activity to Qualified.</i>

Error ID	Category	Description
8138	Fault	<i>A required user defined field was not supplied.</i>
8197	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who added the Referral Activity.</i>
8198	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who the Referral Activity has been referred to.</i>

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8007	Warning	<i>The ErrCode is invalid.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8109</ElemCanocVal>
      <ElemCanocValDesc> The officer is the Officer Added and does not have sufficient
        privileges to set the Referral Activity to terminating status.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8113</ElemCanocVal>
      <ElemCanocValDesc> The officer permissions AllowReferralToSelfToTerminate is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database. For Symitar, it may represent the MBRNumber.

The following errors, warnings, or faults may occur with this element.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

Error ID	Category	Description
8019	Error	The elements provided did not result in a valid or unique client in the Synapsys database.
8191	Warning	OvrrdInstRtId is not supported on this element.
8192	Error	The associate sending the request cannot view the client or add/modify events and activities for them.
8193	Error	The OvrrdInstRtId value that was provided is not valid.
8194	Error	More than one OvrrdInstRtId value was

Error ID	Category	Description
		<i>provided.</i>

### CRMRelCode (Optional)

This optional element represents a valid client or additional service only client relcode1 within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>

### TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8019	Error	<i>The elements provided did not result in a valid or unique client in the Synapsys database.</i>
8192	Error	<i>The associate sending the request cannot view the client or add/modify events and activities for them.</i>
8193	Error	<i>The OvrrdInstRtId value that was provided is</i>

Error ID	Category	Description
		<i>not valid.</i>
8194	Error	<i>More than one OvrddInstRtId value was provided.</i>

### CRMReferInfoRec (Required)

This complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8045	Error	<i>CRMReferInfoRec is required.</i>

### ReferCmnt (Optional)

This element represents any comments associated with a referral activity.

### ReferOffCode (Required)

This element represents the associate who the referral activity is referred to. If not provided, the referral activity is referred to the user who is submitting the Synapsys CRM service request.

In a multibank environment, the **OvrddInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8075	Error	<i>The selected officer is not valid or cannot be selected to receive a Referral Activity.</i>
8114	Error	<i>The officer permission AllowViewPvtEvent is set to False.</i>

Error ID	Category	Description
8129	Error	<i>This element is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *BRCode*, **CanocValTxt** contains the branch associated with the officer. This information is only provided when the setting **ReferralBranchVisible** = 2, which indicates that the **BRCode** should be set to the branch of the **ReferOffCode** officer.

**NOTE**

When the *BRCode* is included in the response information for **ReferOffCode**, the *BRCode* value must be updated to the *BRCode* value returned for the officer selected in **ReferOffCode**.

- When **CanocValDetail** = *IsQueueOfficer*, **CanocValTxt** indicates if this `elemcanocval` is a queue.
- When **CanocValDetail** = *OvrrdInstRtId*, **CanocValTxt** contains the ABA number for the institution of the associate in **ElemCanocVal**.

```

SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>TMZ</ElemCanocVal>
    <ElemCanocValDesc>Trudy ██████████</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>BrCode</CanocValDetail>
        <CanocValTxt>10</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsQueueOfficer</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>OvrrdInstRtId</CanocValDetail>
        <CanocValTxt> 223093564 </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>Q123</ElemCanocVal>
    <ElemCanocValDesc>Queue 123</ElemCanocValDesc>
  </ElemCanocRec>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>BrCode</CanocValDetail>
      <CanocValTxt>20</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsQueueOfficer</CanocValDetail>
      <CanocValTxt>>true</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>OvrrdInstRtId</CanocValDetail>
      <CanocValTxt>223093564 </CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## ReferStatCode (Required)

This element represents the status of the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8078	Error	<i>ReferStatCode is invalid.</i>
8079	Error	<i>ReferStatCode is invalid.</i>
8157	Error	<i>The officer does not have sufficient privileges to set the Event or Activity to a terminating status.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains a numeric representation of how values for **ReferStatCode** should be returned.
  - When **CanocValDetail** = *IsTerminating*, **CanocValTxt** indicates if the status is a terminating status. When a status is terminating, the element **CRMProdCode** is required.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>A</ElemCanocVal>
    <ElemCanocValDesc>Active</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>1</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsTerminating</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>X</ElemCanocVal>
    <ElemCanocValDesc>Not Interested</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>2</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsTerminating</CanocValDetail>
        <CanocValTxt>>false</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>S</ElemCanocVal>
    <ElemCanocValDesc>Sold</ElemCanocValDesc>
  </ElemCanocRec>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>PresentationOrdinal</CanocValDetail>
      <CanocValTxt>3</CanocValTxt>
    </CanocValInfo>
    <CanocValInfo>
      <CanocValDetail>IsTerminating</CanocValDetail>
      <CanocValTxt>>true</CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## BrCode (Optional)

This element represents the branch.

If not provided, this element is defaulted based on the system setting **ReferralBranchVisible**.

- When **ReferralBranchVisible** is set to (0) *Visible-False*, **BrCode** defaults to the branch of the associate who is sending the request.
- When **ReferralBranchVisible** is set to (1) *Officer Added*, **BrCode** defaults to the branch of the associate who is sending the Synapsys CRM service request.
- When **ReferralBranchVisible** is set to (2) *Officer Referred To*, **BrCode** defaults to the branch of the associate who is sent in **ReferOffCode**.
- When **ReferOffCode** is blank, **BrCode** defaults to the branch of the associate who is sending the Synapsys CRM service request.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8017	Error	<i>BRCode is invalid.</i>
8053	Warning	<i>This element is not supported for this service.</i>
8197	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who added the Referral Activity.</i>
8198	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who the Referral</i>

Error ID	Category	Description
		<i>Activity has been referred to.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

**NOTE**

If the **ReferralBarnchVisible** setting is `0`, this element is not returned in the Service Dictionary.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1100</ElemCanocVal>
      <ElemCanocValDesc>Downtown Branch</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>1200</ElemCanocVal>
      <ElemCanocValDesc>West Branch</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

**ReferDueDt (Optional)**

This element represents the date on which the referral activity was added.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8072	Error	<i>ReferDueDt is invalid.</i>

## ReferBonusDueDt (Optional)

This element represents the date that the referral activity must be fulfilled by and depends on the system settings **QualifiedReferralReceiverVisible** and **QualifiedReferralSenderVisible**.

When **QualifiedReferralReceiverVisible** and **QualifiedReferralReceiverVisible** are set to *False*, **ReferBonusDueDt** is not supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8121	Fault	<i>The officer does not have sufficient privileges to set a Referral activity to Qualified.</i>
8128	Error	<i>The element value provided is invalid.</i>

## AcctId (Optional)

This element represents the account number that is related to the referral activity.

## AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8011	Error	<i>CRMAcctType is invalid.</i>
8012	Error	<i>CRMAcctType is required.</i>

Error ID	Category	Description
8076	Error	A referral matching this has been created already. ReferralCheckForDuplicate is set to True.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
  - When **CanocValDetail** is `DefaultReferOffCode`, the **CanocValTxt** indicates the default associate for this account type.
  - When **CanocValDetail** is `DefaultReferStatCode`, the **CanocValTxt** indicates the default status for this account type.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>2</ElemCanocVal>
      <ElemCanocValDesc>Checking Account - 2</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DefaultReferOffCode</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>DefaultReferStatCode</CanocValDetail>
          <CanocValTxt>R</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>15</ElemCanocVal>
      <ElemCanocValDesc>Business Loan - 15</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DefaultReferOffCode</CanocValDetail>
          <CanocValTxt>TMZ</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>DefaultReferStatCode</CanocValDetail>
          <CanocValTxt>R</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMProdCode (Required)

This element represents a specific type of deposit, loan, or additional service associated with the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8042	Error	<code>CRMProdCode is invalid.</code>
8043	Error	<code>CRMProdCode is required.</code>
8076	Error	<code>A referral matching this has been created already. ReferralCheckForDuplicate is set to True.</code>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `AcctType`, **CanocValTxt** contains the **AcctType** that the **CRMProdCode** is associated with.
  - When **CanocValDetail** = `ProductInfoURL`, **CanocValTxt** contains a link that contains information about the **AcctType** value.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>26</ElemCanocVal>
    <ElemCanocValDesc>Special Escrow</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>AcctType</CanocValDetail>
        <CanocValTxt>2</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ProductInfoUrl</CanocValDetail>
        <CanocValTxt>http://google.com</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>28</ElemCanocVal>
    <ElemCanocValDesc>Official Checks</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>AcctType</CanocValDetail>
        <CanocValTxt>2</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ProductInfoUrl</CanocValDetail>
        <CanocValTxt>http://google.com</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>44</ElemCanocVal>
    <ElemCanocValDesc>CONSUMER RE-VAR NON</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>AcctType</CanocValDetail>
        <CanocValTxt>11</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ProductInfoUrl</CanocValDetail>
        <CanocValTxt>http://google.com</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>46</ElemCanocVal>
    <ElemCanocValDesc>CONSUMER RE-FIX R</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>AcctType</CanocValDetail>
        <CanocValTxt>11</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>ProductInfoUrl</CanocValDetail>
        <CanocValTxt>http://google.com</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMEventId (Optional)

This element represents a unique ID of a valid sales event that is related to the referral activity.

- When **CreateSalesEventForEveryReferral** is set to *True*, a sales event is created when the referral activity is created. Any value sent in **CRMEventId** is ignored.
- When **CreateSalesEventForEveryReferral** is set to *False*, and **CRMEventId** is passed, the referral activity is associated with the sales event passed in **CRMEventID**.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>EventOffCode is invalid.</i>
8128	Error	<i>The element value provided is invalid.</i>
8169	Error	<i>CRMEventId is not supported when PotSaleId is provided indicating referral is being created from PSO.</i>

## CustProdOwn (Optional)

This element indicates if the referral activity is related to an existing product and depends on the system setting **ReferralExistingProductVisible**.

When **ReferralExistingProductsVisible** = *False*, **CustProdOwn** is not supported.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8047	Error	<i>CustProdOwn is invalid.</i>
8053	Warning	<i>This element is not supported for this service.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## CRMOffArray (Optional)

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element. Only three CC associates are permitted for a referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8037	Error	<i>The record count of officers is invalid for this service.</i>

## CRMOffRec

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

# CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the `CRMOffCode` should have with the referral activity.

The canonical value is `CC`.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<code>CRMOffCodeText</code> is not valid.
8041	Error	<code>CRMOffCodeText</code> is required.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CC</ElemCanocVal>
      <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended to be a
      CC officer.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  .
  .
  .
</SvcDictInfoRec>
```

# CRMOffCode

## CRMOffCode

This element represents the associate who should be affiliated with the referral.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8114	Fault	<i>The officer permission AllowViewPvtEvent is set to False.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

### NOTE

The values returned appear in alphabetical order according to the name that is returned in **ElemCanocValDesc**.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- When the **CanocValDetail** is *OvrrdInstRtId*, the **CanocValTxt** is the ABA number of the institution of the associate in the **ElemCanocVal**.

```

SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>TMZ</ElemCanocVal>
    <ElemCanocValDesc>Trudy Z ██████ </ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>OvrrdInstRtId</CanocValDetail>
        <CanocValTxt>██████████ </CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>SAT</ElemCanocVal>
    <ElemCanocValDesc>Sally T ██████ </ElemCanocValDesc>
  </ElemCanocRec>
  <CanocValInfoArray>
    <CanocValInfo>
      <CanocValDetail>OvrrdInstRtId</CanocValDetail>
      <CanocValTxt>██████████ </CanocValTxt>
    </CanocValInfo>
  </CanocValInfoArray>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8092	Error	<i>The record count of User Defined elements is invalid for this service.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>

## UserDefInfo

The `UserDefInfo` contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

Canonical values are:

- *UserDefined1*
- *UserDefined2*
- *UserDefined3*

The following errors, warnings, or faults may occur with **UserDefCode**.

Error ID	Category	Description
8089	Error	<b>UserDefCode</b> is invalid.
8091	Error	Element is required for user-defined fields.

The following is a partial XML example of what is returned in the `SvcDictInfoArray` of Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in **UserDefCode**.
- **ElemCanocValDesc** represents the friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** equals *DataType*, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values are:
    - *ValueList*
    - *Text*
    - *Currency*
    - *Number* (decimals allowed)

- *Date*
- When **CanocValDetail** equals *IsRequired*, **CanocValTxt** indicates if the user-defined field returned in **ElemCanocVal** is required or not.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined1</ElemCanocVal>
      <ElemCanocValDesc>Please provide your full name.</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>Text</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined2</ElemCanocVal>
      <ElemCanocValDesc>What is annual income.</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>Number</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined3</ElemCanocVal>
      <ElemCanocValDesc>Best Method of Contact</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>ValueList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## UserDefTxt

# UserDefTxt

The **UserDefTxt** element represents the value to be associated with the **UserDefCode** that should be included with the referral activity.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8091	Error	<i>Element is required for user defined fields.</i>
8098	Error	<i>UserDefTxt is invalid.</i>
8125	Warning	<i>The max size has been exceeded for this element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the unique value that should be sent in **UserDefTxt** when the associated data type of the **UserDefCode** is *ValueList*.
- **ElemCanocValDesc** friendly text appears in drop-down lists when the associated data type of the **UserDefCode** is *ValueList*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field.
  - When **CanocValDetail** equals *UserDefCode*, **CanocValTxt** contains the **UserDefCode**, which indicates the user-defined field to associate the value in **ElemCanocVal**.
  - When **CanocValDetail** is *PresentationOrdinal*, **CanocValTxt** contains the order the **ElemCanocVal** options appear in the list.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>1</ElemCanocVal>
        <ElemCanocValDesc>Phone</ElemCanocValDesc>
        <CanocValInfoArray>
          <CanocValInfo>
            <CanocValDetail>UserDefCode</CanocValDetail>
            <CanocValTxt>UserDefined3</CanocValTxt>
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>PresentationOrdinal</CanocValDetail>
            <CanocValTxt>1</CanocValTxt>
          </CanocValInfo>
        </CanocValInfoArray>
      </ElemCanocRec>
      <ElemCanocRec>
        <ElemCanocVal>2</ElemCanocVal>
        <ElemCanocValDesc>Email</ElemCanocValDesc>
        <CanocValInfoArray>
          <CanocValInfo>
            <CanocValDetail>UserDefCode</CanocValDetail>
            <CanocValTxt>UserDefined3</CanocValTxt>
          </CanocValInfo>
          <CanocValInfo>
            <CanocValDetail>PresentationOrdinal</CanocValDetail>
            <CanocValTxt>2</CanocValTxt>
          </CanocValInfo>
        </CanocValInfoArray>
      </ElemCanocRec>
    </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## Ver\_2 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## PotSaleId (Optional)

This element indicates the potential sales opportunity that the referral activity was created from.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

### SalesStatCode (Required)

This element represents the status of the sales event.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8128	Error	<i>The element value provided is invalid.</i>

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>346</ElemCanocVal>
      <ElemCanocValDesc>New Event</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>299</ElemCanocVal>
      <ElemCanocValDesc>Closed</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### WorkflowProcStat (Optional)

This element indicates whether the activity should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFLockdown.</i>
8164	Fault	<i>EWFLockdownOnCreate is set to true.</i>

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### SalesPrivType (Optional)

The **SalesPrivType** element indicates whether the related sales event should be marked as private and depends on the system setting **UsePrivateEventFlag**.

When **UsePrivateEventFlag** = *False*, the **EventPrivType** is not supported.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

The following is a complete XML example of what is returned in the `SvcDictInfoArrayOfServiceDictionarySearch` response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in **EventPrivType**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## Response

The service provider (Synapsys) returns the `CRMReferAdd` response message to the service consumer, which contains the following simple elements.

### ReferId

This element represents the unique ID assigned to the Synapsys referral activity.

### RsStat

This element specifies the status of the add request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Referral Activity Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMReferInq

The CRM referral activity inquiry service returns element details for a specific referral activity. The referral activity identification element **ReferId** is required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to referral activity information.

The referral activity inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific referral activity based on the referral activity ID. If the referral activity ID is not known, the consumer must first perform a referral activity search to obtain the referral activity ID for the desired referral activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

## Message Flow

### CRM Referral Activity Search Request

CRMReferSrchrq\_MType

The consumer sends the CRMReferSrchrq\_MType message containing at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDt**, or **EndDt**.

### CRM Referral Activity Search Response

CRMCustSrchrRs\_MType

The service provider sends the CRMReferSrchrRs\_MType message containing an echo of the request, plus CRMReferSrchrArray.

### CRM Referral Activity Inquiry Request

CRMReferInqrq\_MType

The consumer sends the CRMReferInqrq\_MType message containing the required element **ReferId** for the desired activity.

### CRM Referral Activity Inquiry Response

CRMCustInqRs\_MType

The service provider sends the CRMReferInqRs\_MType message containing an echo of the request, plus CRMReferInfoRec.

## Request

The third-party consumer forwards the `CRMReferInq` request message to the service provider.

The following elements are contained within this request message and are necessary for Synapsys CRM services.

The following general errors or warnings may occur with the `CRMReferInq` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8144	Warning	<i>Officer requesting does not have sufficient privileges to delete.</i>

## ReferId (Required)

This element represents the unique ID assigned to the Synapsys referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8074	Error	<i>ReferId is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Response

The service provider (Synapsys) returns the `CRMReferInq` response message to the service consumer, which returns element details for a specific referral activity based on the **ReferId** that was requested.

The arrays, simple elements, and complex elements contained within the **CRMReferInq** response applicable for Synapsys CRM services include the following.

### ActIntentKey

This key, provided by the service provider, is delivered to the consumer to be submitted in the subsequent modification operation (update or delete) for the data set returned in the inquiry response.

### CRMReferInqRec

The `CRMReferInqRec` complex element contains a package of data related to a referral activity and includes the following simple elements.

### CRMReferInfoRec

The `CRMReferInfoRec` complex element contains a package of data related to a Synapsys activity and includes the following simple elements.

### **ReferDt (Optional)**

This element represents the date on which the referral activity was added.

### **ReferCrtOffCode**

This element represents the code of the associate who created the referral activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ReferCmnt**

This element represents any comments associated with a referral activity.

### **ReferRecv**

This element indicates whether the associate who the referral activity has been referred to has read the referral activity.

Canonical values are:

- *True*
- *False*

### **ReferOffCode**

This element represents the code of the associate who the referral activity has been referred to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

### **ReferStatCode**

This element represents the status of the referral activity.

### **BrCode**

This element represents the branch and is available based on the system setting **ReferralBranchVisible**.

### **ReferDueDt**

This element represents the date on which the referral activity was added.

### **ReferBonusDueDt**

This element represents the date on which the referral activity must be fulfilled by and is dependent on the system settings **QualifiedReferralReceiverVisible** and **QualifiedReferralSenderVisible**.

### **AcctId**

This element represents the account number that is related to the referral activity.

### **AcctType**

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

### **CRMProdCode**

This element represents a specific type of deposit, loan, or additional service associated with the referral activity.

### **CustProdOwn**

This element indicates if the referral activity is related to an existing product and depends on the system settings **ReferralExistingProductVisible**.

When **ReferralExistingProductsVisible** = *False*, **CustProdOwn** is not supported.

Canonical values are:

- *True*
- *False* (default)

### **CRMEventId**

This represents a unique ID of a valid sales event that is related to the referral activity.

## **CRMOffArray**

This array is a collection of associates that are associated with the event and contains the complex `CRMOffRec` element.

## CRMOffRec

## CRMOffRec

This element contains a package of data related to associates affiliated with a Synapsys referral activity. It contains the following simple elements.

The `CRMOffRec` should not be returned if there is no value that will be returned in `CRMOffCodeText`.

## CRMOffCodeText

## CRMOffCodeText

This element represents the affiliation that the **CRMOffCode** has with the referral activity. For referral activities, the value is always `CCAssoc`.

## CRMOffCode

## CRMOffCode

This element represents the code of the CC associate on the referral activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## CRMOffDesc

## CRMOffDesc

This element represents the name of the associate who is assigned to the referral activity.

## **UserDefInfoArray**

This array is a collection of additional information that has been associated with the referral activity and contains the complex `UserDefInfo` element.

# UserDefInfo

## UserDefInfo

This complex element contains a package of data related to additional information affiliated with a Synapsys referral activity and includes the following simple elements.

# UserDefTxt

## UserDefTxt

This element represents the text of the additional information that is associated with the referral activity.

# UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the referral activity.

Canonical values are:

- *UserDefined1*
- *UserDefined2*
- *UserDefined3*

### **EscltDt**

This element represents the date on which referral activity was escalated.

### **WorkflowProcStat**

This element indicates whether the activity should be locked down.

### **ReferTime**

This element represents the time that the referral activity was added.

## **ReferId**

This element represents the unique ID assigned to the Synapsys referral activity.

## **CustId**

This element represents the portfolio of the customer whom the referral activity belongs to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **CustRelCode**

This element represents the relcode1 of the client whom the referral activity belongs to.

## **TaxId**

This element represents the Social Security Number or tax ID of the client or prospective client who the referral activity belongs to.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

## **BrCode**

This element represents the branch and is available based on the system setting **ReferralBranchVisible**.

## **BrDesc**

This element represents the name of the branch and is available based on the system setting **ReferralBranchVisible**.

## **AcctTypeDesc**

This element represents the descriptive name of a valid deposit, loan, or additional service that is associated with the referral activity.

## **CRMProdDesc**

This element represents the descriptive name of the type of deposit, loan, or additional

service associated with the referral activity.

### **ReferCrtOffDesc**

This element represents the name of the associate who created the referral activity.

### **ReferOffDesc**

This element represents the name of the associate who the referral activity has been referred to.

### **ReferStatDesc**

This element represents the descriptive text of the status of the referral activity.

### **ModOffCode**

This element represents the code of the associate who modified the referral activity.

### **ModOffDesc**

This element represents the name of the associate who modified the referral activity.

### **ModTimDt**

This element represents the date and time the associate modified the referral activity.

## **CRM Referral Activity Modify**

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMReferMod**

The CRM referral activity modify service allows the service consumer to modify certain elements for a specific referral activity. The **ReferId** and **ActIntentKey** elements are required on the modification request.

The referral activity identification element **ReferId** and the **ActIntentKey** are required on the mod request.

The referral activity modification service uses a typical exchange of `MessageType` messages to

allow updates to the information for a specific referral activity based on the referral activity ID. A referral activity inquiry must always be performed prior to the modification request to retrieve the **ActIntentKey** necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## **Message Flow**

## CRM Referral Activity Inquiry Request

CRMReferInqRq\_MType

The consumer sends the CRMReferInqRq\_MType message containing the required element **ReferId** for the desired activity.

## CRM Referral Activity Inquiry Response

CRMReferInqRs\_MType

The service provider sends the CRMReferInqRs\_MType message containing an echo of the request, plus CRMReferInfoRec.

## CRM Referral Activity Mod Request

CRMReferModRq\_MType

The consumer sends the CRMReferModRq\_MType message containing the required **ReferId** and **ActIntentKey** elements. Additionally, either the CRMReferInfoRec complex element or **DIt** element must be included for the desired referral activity.

## CRM Referral Activity Mod Response

CRMReferModRs\_MType

The service provider sends the CRMReferModRs\_MType message containing the response status **RsStat** indicating if the mod was successful. An unsuccessful mod request also returns the errors that occurred that prevented the mod.

## Request

The third-party consumer forwards the CRMReferMod request message to the service provider.

The following general errors or warnings may occur with the CRMReferMod service. Errors

that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8114	Fault	The officer permission AllowViewPvtEvent is set to False.
8124	Fault	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8196	Error	The officer permission AllowRelEx is set to False.
8201	Error	The officer does not have permission to view an event with this EventCatCode.

### ErrOvrRdInfoArray (Optional)

The consumer can pass known faults in the ErrOvrRdInfoArray that they wish to override when sending the CRMReferMod request message. This array includes the complex element ErrOvrRd, which contains the following simple elements.

#### ErrCode

This element represents a valid error code that pertains to the CRMReferMod request message.

The following error codes are valid for this request message.

Error ID	Category	Description
8108	Error	The officer does not have sufficient privileges to change the Application or Type on the Referral Activity.
8119	Error	Officer requesting does not have sufficient privileges to delete.

Error ID	Category	Description
8121	Error	The officer does not have sufficient privileges to set a Referral activity to Qualified.
8122	Error	The officer does not have sufficient privileges to edit a Referral activity.
8124	Error	The officer permission AllowActivitiesView, which also controls the ability to view events, is set to False.
8138	Error	A required user defined field was not supplied.
8197	Fault	The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who added the Referral Activity.
8198	Fault	The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who the Referral Activity has been referred to.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8007	Warning	The ErrCode is invalid.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>8109</ElemCanocVal>
      <ElemCanocValDesc> The officer is the Officer Added and does not have sufficient
        privileges to set the Referral Activity to terminating status.</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>8113</ElemCanocVal>
      <ElemCanocValDesc> The officer permissions AllowReferralToSelfToTerminate is set to
        False.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ReferId (Required)

This represents a specific referral activity within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8073	Error	<i>ReferId is invalid.</i>
8074	Error	<i>ReferId is required.</i>

## ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

## CRMReferInfoRec (Required when Dlt = False, Optional when DLT = True)

This complex element contains a collection of simple elements and arrays.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8045	Error	<i>CRMReferInfoRec is required.</i>

## ReferDt (Optional)

This element represents the date on which the referral activity was modified.

## ReferCrtOffCode (Optional)

This element represents the code of the associate who created the referral activity.

## ReferCmnt (Optional)

This element represents any comments associated with a referral activity. Comments that are sent are appended to existing comments.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>

## ReferRecv (Optional)

This element indicates whether the event should be marked as being read by the associate who it is assigned to.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8077	Error	<i>ReferRecv must be true or false.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### ReferOffCode (Optional)

This element represents the code of the associate who the referral activity has been referred to.

A list of valid values for **ReferOffCode** can be obtained through a Service Dictionary Search request. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8075	Error	<i>The selected officer is not valid or cannot be selected to receive a Referral Activity.</i>
8111	Fault	<i>The officer does not have sufficient privileges to change the Referred To on the Referral Activity.</i>
8157	Error	<i>The officer does not have sufficient privileges to set the Event or Activity to a terminating status.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *BRCODE*, **CanocValTxt** contains the branch associated with the officer. This information is only provided when the setting **ReferralBranchVisible** = 2, which indicates that **BRCODE** should be set to the branch of the **ReferOffCode** officer.

SvcDictInfoRec>

. . .

<ElemCanocArray>

<ElemCanocRec>

<ElemCanocVal>TMZ</ElemCanocVal>

<ElemCanocValDesc>Trudy ██████████</ElemCanocValDesc>

<CanocValInfoArray>

<CanocValInfo>

<CanocValDetail>BrCode</CanocValDetail>

<CanocValTxt>10</CanocValTxt>

</CanocValInfo>

<CanocValInfo>

<CanocValDetail>IsQueueOfficer</CanocValDetail>

<CanocValTxt>>false</CanocValTxt>

</CanocValInfo>

<CanocValInfo>

<CanocValDetail>OvrrdInstRtId</CanocValDetail>

<CanocValTxt>223093564</CanocValTxt>

</CanocValInfo>

</CanocValInfoArray>

</ElemCanocRec>

<ElemCanocRec>

<ElemCanocVal>Q123</ElemCanocVal>

<ElemCanocValDesc>Queue 123</ElemCanocValDesc>

</ElemCanocRec>

<CanocValInfoArray>

<CanocValInfo>

<CanocValDetail>BrCode</CanocValDetail>

<CanocValTxt>20</CanocValTxt>

</CanocValInfo>

<CanocValInfo>

<CanocValDetail>IsQueueOfficer</CanocValDetail>

<CanocValTxt>>true</CanocValTxt>

</CanocValInfo>

<CanocValInfo>

<CanocValDetail>OvrrdInstRtId</CanocValDetail>

<CanocValTxt>223093564</CanocValTxt>

</CanocValInfo>

</CanocValInfoArray>

</ElemCanocArray>

## ReferStatCode (Optional)

This element represents the status of the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8070	Error	<i>Event or Activity cannot be a terminating status when assigned to a Queue.</i>
8078	Error	<i>ReferStatCode is invalid.</i>
8112	Error	<i>The officer does not have sufficient privileges to update the status on the Referral Activity.</i>
8157	Error	<i>The officer does not have sufficient privileges to set the Event or Activity to a terminating status.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *PresentationOrdinal*, **CanocValTxt** contains a numeric representation of how values for **ReferStatCode** are returned.

- When **CanocValDetail** = *IsTerminating*, **CanocValTxt** indicates if the status is a terminating status. When a status is terminating, the element **CRMProdCode** is required.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>A</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>1</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>X</ElemCanocVal>
      <ElemCanocValDesc>Not Interested</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>PresentationOrdinal</CanocValDetail>
          <CanocValTxt>2</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsTerminating</CanocValDetail>
          <CanocValTxt>>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>S</ElemCanocVal>
      <ElemCanocValDesc>Sold</ElemCanocValDesc>
    </ElemCanocRec>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>3</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>IsTerminating</CanocValDetail>
        <CanocValTxt>>true</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## Ver\_1 (Required - Conditional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## BrCode (Optional)

This element represents the branch.

When **ReferralBranchVisible** is set to (0) *Visible-False*, **BrCode** is not supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8017	Error	<i>BRCode is invalid.</i>
8020	Error	<i>Compensation has been processed already.</i>
8053	Warning	<i>This element is not supported for this service.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8122	Fault	<i>The officer does not have sufficient privileges to edit a Referral activity.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>
8197	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the branch of the associate who added the Referral Activity.</i>
8198	Fault	<i>The system option ReferralBranchVisible indicates the branch should be set to the</i>

Error ID	Category	Description
		<i>branch of the associate who the Referral Activity has been referred to.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>1100</ElemCanocVal>
      <ElemCanocValDesc>Downtown Branch</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>1200</ElemCanocVal>
      <ElemCanocValDesc>West Branch</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### ReferDueDt (Optional)

This element indicates the date needed by for the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8072	Error	<i>ReferDueDt is invalid.</i>
8122	Fault	<i>The officer does not have sufficient</i>

Error ID	Category	Description
		<i>privileges to edit a Referral activity.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### ReferBonusDueDt (Optional)

This element represents the date that the referral activity must be fulfilled by. It depends on the system settings **QualifiedReferralReceiverVisible** and **QualifiedReferralSenderVisible**.

When **QualifiedReferralReceiverVisible** and **QualifiedReferralReceiverVisible** are set to *False*, **ReferDueDt** is not supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8121	Fault	<i>The officer does not have sufficient privileges to set a Referral activity to Qualified.</i>
8128	Error	<i>The element value provided is invalid.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### AcctId (Optional)

This element represents the account number that is related to the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8122	Fault	<i>The officer does not have sufficient privileges to edit a Referral activity.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8011	Error	<i>CRMAcctType is invalid.</i>
8020	Error	<i>Compensation has been processed already.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8076	Error	<i>A referral matching this has been created already. ReferralCheckForDuplicate is set to True.</i>
8108	Fault	<i>The officer does not have sufficient privileges to change the Application or Type on the Referral Activity.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>2</ElemCanocVal>
    <ElemCanocValDesc>Checking Account - 2</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>DefaultReferOffCode</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DefaultReferStatCode</CanocValDetail>
        <CanocValTxt>R</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DefaultAssignToMeReferStatCode</CanocValDetail>
        <CanocValTxt>R</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>15</ElemCanocVal>
    <ElemCanocValDesc>Business Loan - 15</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>DefaultReferOffCode</CanocValDetail>
        <CanocValTxt>TMZ</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DefaultReferStatCode</CanocValDetail>
        <CanocValTxt>R</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>DefaultAssignToMeReferStatCode</CanocValDetail>
        <CanocValTxt>R</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## CRMProdCode (Optional)

This element represents a specific type of deposit, loan, or additional service associated with the referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8042	Error	<i>CRMProdCode is invalid.</i>
8043	Error	<i>CRMProdCode is required.</i>
8076	Error	<i>A referral matching this has been created already. ReferralCheckForDuplicate is set to True.</i>
8108	Fault	<i>The officer does not have sufficient privileges to change the Application or Type on the Referral Activity.</i>
8137	Error	<i>The field you are trying to blank out is required. JHANull is not accepted.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = `AcctType`, **CanocValTxt** contains the **AcctType** that the **CRMProdCode** is associated with.
  - When **CanocValDetail** = `ProductInfoURL`, **CanocValTxt** contains a link that contains

information about the **AcctType** value.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>26</ElemCanocVal>
      <ElemCanocValDesc>Special Escrow</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AcctType</CanocValDetail>
          <CanocValTxt>2</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ProductInfoUrl</CanocValDetail>
          <CanocValTxt>http://google.com</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>28</ElemCanocVal>
      <ElemCanocValDesc>Official Checks</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AcctType</CanocValDetail>
          <CanocValTxt>2</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ProductInfoUrl</CanocValDetail>
          <CanocValTxt>http://google.com</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>44</ElemCanocVal>
      <ElemCanocValDesc>CONSUMER RE-VAR NON</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AcctType</CanocValDetail>
          <CanocValTxt>11</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ProductInfoUrl</CanocValDetail>
          <CanocValTxt>http://google.com</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>46</ElemCanocVal>
      <ElemCanocValDesc>CONSUMER RE-FIX R</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>AcctType</CanocValDetail>
          <CanocValTxt>11</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>ProductInfoUrl</CanocValDetail>
          <CanocValTxt>http://google.com</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
    </ElemCanocRec>
  </ElemCanocArray>
</SvcDictInfoRec>

```

## CustProdOwn (Optional)

This element indicates if the referral activity is related to an existing product and depends on the system settings **ReferralExistingProductVisible**.

When **ReferralExistingProductsVisible** = *False*, **CustProdOwn** is not supported.

Canonical values are:

- *True*
- *False*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8047	Error	<i>CustProdOwn is invalid.</i>
8053	Warning	<i>This element is not supported for this service.</i>
8065	Error	<i>JHANull is not supported for element.</i>
8122	Fault	<i>The officer does not have sufficient privileges to edit a Referral activity.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

**CRMEventId (Optional)**

This element represents a unique ID of the event that the referral activity is associated with.

**CRMOffArray (Optional)**

This array is a collection of associates that are associated with the event and contains the complex CRMOffRec element. Only three CC associates are permitted for a referral activity.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8037	Error	<i>The record count of officers is invalid for this service.</i>

**CRMOffRec**

This element contains a collection of simple elements. If any records exist within the array, the following simple elements must be provided.

**CRMOffCodeText**  
**CRMOffCodeText**

This element represents the affiliation that the **CRMOffCode** should have with the referral

activity.

The canonical value is *CC*.

Passing **JHANull** = *True* on this element has no effect.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8040	Error	<i>CRMOffCodeText is not valid.</i>
8041	Error	<i>CRMOffCodeText is required.</i>
8065	Error	<i>JHANull is not supported for element.</i>

The following partial XML example shows what is returned in the *SvcDictInfoArray* of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>CC</ElemCanocVal>
      <ElemCanocValDesc>Indicates that the CRMOffCode being passed is intended to be a CC
officer.</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# CRMOffCode

## CRMOffCode

This element represents the associate who should be affiliated with the referral activity.

Passing **JHANull** = *True* on this element causes the fields being referenced in **CRMOffCode** to be cleared.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8038	Error	<i>Officer provided is not a valid officer in the Synapsys database or is not permitted for operation.</i>
8039	Error	<i>CRMOffCode is required.</i>
8201	Error	<i>The officer does not have permission to view an event with this EventCatCode.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- When **CanocValDetail** = *OvrrdInstRtId*, **CanocValTxt** represents the ABA number for the institution of the associate in the **ElemCanocVal**.

```

SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>TMZ</ElemCanocVal>
    <ElemCanocValDesc>Trudy ██████████</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>OvrrdInstRtId</CanocValDetail>
        <CanocValTxt>██████████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>SAT</ElemCanocVal>
    <ElemCanocValDesc>Sally ██████████</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>OvrrdInstRtId</CanocValDetail>
        <CanocValTxt>██████████</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

### UserDefInfoArray (Optional)

This array is a collection of additional information that is associated with the event and contains the complex **UserDefInfo** element.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8020	Error	<i>Compensation has been processed already.</i>
8122	Fault	<i>The officer does not have sufficient privileges to edit a Referral activity.</i>
8092	Error	<i>The record count of User Defined elements is invalid for this service.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>
8163	Error	<i>The element is currently locked down because the Event/Activity is currently in a workflow.</i>

### UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

## UserDefCode

## UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the referral activity.

Canonical values are:

- *UserDefined1*
- *UserDefined2*
- *UserDefined3*

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8089	Error	<i>UserDefCode is invalid.</i>
8091	Error	<i>Element is required for user defined fields.</i>
8137	Error	<i>The field you are trying to blank out is required. JHANull is not accepted.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.
- The `CanocValInfoArray` contains the following additional information.
  - When **CanocValDetail** = *DataType*, **CanocValTxt** contains the data type associated with the user-defined field stored in **ElemCanocVal**. Possible values include the following.
    - *ValueList*
    - *Text*
    - *Currency*
    - *Number* (decimals allowed)
    - *Date*
  - When **CanocValDetail** = *IsRequired*, **CanocValTxt** indicates if the user-defined field returned in **ElemCanocVal** is required or not.

```

<SvcDictInfoRec>
  * * *
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined1</ElemCanocVal>
      <ElemCanocValDesc>Please provide your full name.</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>Text</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined2</ElemCanocVal>
      <ElemCanocValDesc>What is annual income.</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>Number</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>false</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>UserDefined3</ElemCanocVal>
      <ElemCanocValDesc>Best Method of Contact</ElemCanocValDesc>
      <CanocValInfoArray>
        <CanocValInfo>
          <CanocValDetail>DataType</CanocValDetail>
          <CanocValTxt>ValueList</CanocValTxt>
        </CanocValInfo>
        <CanocValInfo>
          <CanocValDetail>IsRequired</CanocValDetail>
          <CanocValTxt>true</CanocValTxt>
        </CanocValInfo>
      </CanocValInfoArray>
      <SvcPrvdInfo></SvcPrvdInfo>
    </ElemCanocRec>
  </ElemCanocArray>
  <SvcPrvdInfo></SvcPrvdInfo>
</SvcDictInfoRec>

```

## UserDefTxt

# UserDefTxt

This element represents the value to be associated with the **UserDefCode** that should be included with the referral activity.

Passing **JHANull** = *True* on this element has no effect.

This element allows for a maximum of 50 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8065	Error	<i>JHANull is not supported for element.</i>
8091	Error	<i>Element is required for user defined fields.</i>
8098	Error	<i>UserDefTxt is invalid.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the unique value that should be sent in **UserDefTxt** when the associated data type of the **UserDefCode** is *ValueList*.
- **ElemCanocValDesc** friendly text that appears in drop-down menus when the associated data type of the **UserDefCode** is *ValueList*.
- The `CanocValInfoArray` contains the necessary values to save the value from **ElemCanocVal** with the user-defined field. When **CanocValDetail** = *UserDefCode*, **CanocValTxt** contains the **UserDefCode**, which indicates the user-defined field to associate the value in **ElemCanocVal**.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>1</ElemCanocVal>
    <ElemCanocValDesc>Phone</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>UserDefined3</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>1</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
  <ElemCanocRec>
    <ElemCanocVal>2</ElemCanocVal>
    <ElemCanocValDesc>Email</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>UserDefCode</CanocValDetail>
        <CanocValTxt>UserDefined3</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>PresentationOrdinal</CanocValDetail>
        <CanocValTxt>2</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## Ver\_2

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## SalesPrivType (Optional)

The **SalesPrivType** element indicates whether the related sales activity should be marked as private and depends on the system setting **UsePrivateEventFlag**

When **UsePrivateEventFlag** = *False*, the **EventPrivType** is not supported.

Canonical values are:

- *True*
- *False*

### SalesOffCode (Optional)

This element represents the **Assigned To** officer on the related sales event. When used, it must be the same value as **ReferOffCode**.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8065	Warning	<i>JHANull is not supported for element.</i>
8128	Error	<i>The element value provided is invalid.</i>

### SalesStatCode (Optional)

This element represents the status on the related sales event. When used, it must be a status that is terminating.

The following errors, warnings, or faults may occur with **SalesStatCode**.

Error ID	Category	Description
8053	Warning	This element is not supported for this service.
8065	Warning	<i>JHANull</i> is not supported for the element.
8128	Error	The element value provided is invalid.

### WorkflowProcStat (Optional)

This element indicates whether the activity should be locked down.

This element is only supported for jhaEnterprise Workflow.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8162	Error	<i>Consumer does not have permission to set EWFlockdown.</i>

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>False</ElemCanocVal>
      <ElemCanocValDesc>Unlocked</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>True</ElemCanocVal>
      <ElemCanocValDesc>Locked</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### Dlt (Optional)

This element represents the desire for deletion of the specified referral activity.

Canonical values are:

- *True*
- *False* (default)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8052	Error	<i>Dlt must be true or false.</i>
8119	Fault	<i>Officer requesting does not have sufficient privileges to delete.</i>
8163	Error	<i>The element is currently locked down because</i>

Error ID	Category	Description
		<i>the Event/Activity is currently in a workflow.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represents the value that is returned in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## Response

The service provider (Synapsys) returns the `CRMReferMod` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service

Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>Success</ElemCanocVal>
      <ElemCanocValDesc>Success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>Fail</ElemCanocVal>
      <ElemCanocValDesc>Fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CRM Referral Activity Search

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMReferSrch

The CRM referral activity search service returns all referral activities for a particular **InstRtld** based on specified filter criteria. The request provides the following optional filters:

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDate** (optional)
- **EndDate** (optional)
- **ReferOffCode** (optional)
- **ReferStatCode** (optional)

When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

This service supports the **MaskVal** attribute.

## Message Flow

### CRM Referral Activity Search Request

CRMActAddRq\_MType

The consumer sends the CRMReferSrchrq\_MType message containing at least one of the optional search elements: **AccountId**, **CustId**, **TaxId**, **StartDt**, **EndDt**, **ReferOffCode**, or **ReferStatCode**.

### CRM Referral Activity Search Response

CRMReferSrchrRs\_MType

The service provider sends the CRMReferSrchrRs\_MType message continuing an echo of the request, plus CRMReferSrchrArray.

## Request

The third-party consumer forwards the CRMReferSrchr request message to the service provider.

At least one of the additional elements contained within the CRMReferSrchr request message is necessary for Synapsys CRM services.

The following general errors or warnings may occur with the CRMReferSrchr service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request</i>

Error ID	Category	Description
		<i>received.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>

### AccountId (Optional)

This complex element contains the following elements.

#### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

If **AcctId** is provided, **AcctType** must also be provided. This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>

#### AcctType (Required)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be

provided.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8012	Error	<i>CRMAcctType is required.</i>

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>2</ElemCanocVal>
      <ElemCanocValDesc>Checking Account</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>11</ElemCanocVal>
      <ElemCanocValDesc>Personal Loan</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8194	Error	<i>More than one OvrddInstRtId value was provided.</i>

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrddInstRtId** attribute is supported.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8086	Error	<i>SrchType is not supported for element.</i>
8194	Error	<i>More than one OvrddInstRtId value was provided.</i>

## StartDt (Optional)

This optional element designates the starting point used for searching activities based on the date that they were added. If no **StartDt** is specified, Synapsys returns all available activities that have an added date that is less than the specified **EndDt**.

## EndDt (Optional)

This optional element designates the ending point to use for searching activities based on the date they were added. If no **EndDt** is specified, Synapsys returns all available events that have an added date that is greater than the specified **StartDt**.

## ReferOffCode (Optional)

This optional element aids in filtering referral activities based on who they are currently referred to.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. In a multibank environment, the **OvrrdInstRtld** attribute is supported.

The following additional value is available:

- *CurUsr* - Filters referral activities based on the officer who has been derived from the header sent along with the **CRMReferSrch** request.

## ReferStatCode (Optional)

This optional element that aides in filtering referral activities based on their current status. Valid status values may be sent.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following additional values are available:

- *Act* - Returns referral activities that are not in a terminating status.
- *Esclt* - Returns referral activities that have been escalated.
- *ActEsclt* - Return referral activities that are not in a terminating status and that have been escalated.

## Response

The service provider (Synapsys) returns the `CRMReferSrch` response message to the service consumer, which returns a list of referral activity records that meet the specified search criteria.

The arrays contained within the `CRMReferSrch` response message include the following.

### CRMReferSrchArray

This element returns an array of responses for the referral activity search and includes the `CRMReferSrchRec` complex element for each referral activity record returned.

## CRMReferSrchRec

This complex element contains a package of data related to a Synapsys referral activity and includes the following simple elements.

## CRMReferInfoRec

This complex element contains a package of data related to a referral activity and includes the following simple elements.

## ReferDt

## ReferDt

This element represents the date on which the referral activity was added.

## ReferCrtOffCode

## ReferCrtOffCode

This element represents the code of the associate who created the referral activity.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**. This is also the value that would be returned in **ReferCrtOffDesc**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ReferCmnt

## ReferCmnt

This element represents any comments associated with a referral activity.

## ReferRecv

## ReferRecv

This element indicates whether the associate who the referral activity has been referred to has read the referral activity.

Canonical values are:

- *True*
- *False*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## ReferOffCode

## ReferOffCode

This element represents the code of the associate who the referral activity has been referred to.

In a multibank environment, the **OvrrdInstRtId** attribute is supported.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value that is returned in **ReferOffCode**.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**. This value would also be returned in **ReferOffDesc**.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>SAT</ElemCanocVal>
      <ElemCanocValDesc>Sally A ██████ </ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>JAT</ElemCanocVal>
      <ElemCanocValDesc>Joe A ██████ </ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

# ReferStatCode

## ReferStatCode

This element represents the status of the referral activity.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**. This is also the value that would be returned in **ReferStatDesc**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>A</ElemCanocVal>
      <ElemCanocValDesc>Active</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>X</ElemCanocVal>
      <ElemCanocValDesc>Not Interested</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>S</ElemCanocVal>
      <ElemCanocValDesc>Sold</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# ReferDueDt

## ReferDueDt

This element represents the date on which the referral activity was added.

# AcctId

## AcctId

This element represents the account number that is related to the referral activity.

# AcctType

## AcctType

This element represents the code of the product code family (e.g., savings, checking, etc.) associated with the referral activity.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>2</ElemCanocVal>
      <ElemCanocValDesc>Checking Account</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>11</ElemCanocVal>
      <ElemCanocValDesc>Personal Loan</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

# ReferTime

## ReferTime

This element represents the time that the referral activity was added.

# Ver\_1

## Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## EscItDt

## EscItDt

This element represents the date on which referral activity was escalated.

## PersonName

## PersonName

This complex element contains the following elements.

## ComName

## ComName

This element represents the customer's full name.

## FirstName

## FirstName

This element represents the customer's first name.

## LastName

## LastName

This element represents the customer's last name.

### **TaxId**

This represents the Social Security Number or tax ID of the client or prospective client who the referral activity belongs to.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

### **CustId**

This represents the portfolio of the client who the referral activity belongs to.

### **ReferId**

This element represents the unique ID assigned to the Synapsys referral activity.

### **ReferCrtOffDesc**

This element represents the name of the associate who created the referral activity.

### **ReferOffDesc**

This element represents the name of the associate who the referral activity has been referred to.

### **ReferStatDesc**

This element represents the descriptive text of the status of the referral activity.

## **CRM Potential Sales Services**

Synapsys has messaging services for the search of potential sales information on service providers.

## **CRM Potential Sales Search**

**Container: TPG\_CustomerMaster.xsd**

**Message: CRMPotSaleSrch**

The CRM potential sales search service returns all the potential sales opportunities for a particular **InstRtId** based on specified filter criteria. The request provides the following optional filters.

- **AccountId** (optional)
- **CustId** (optional)
- **TaxId** (optional)
- **StartDt** (optional) - not supported currently
- **EndDt** (optional) - not supported currently

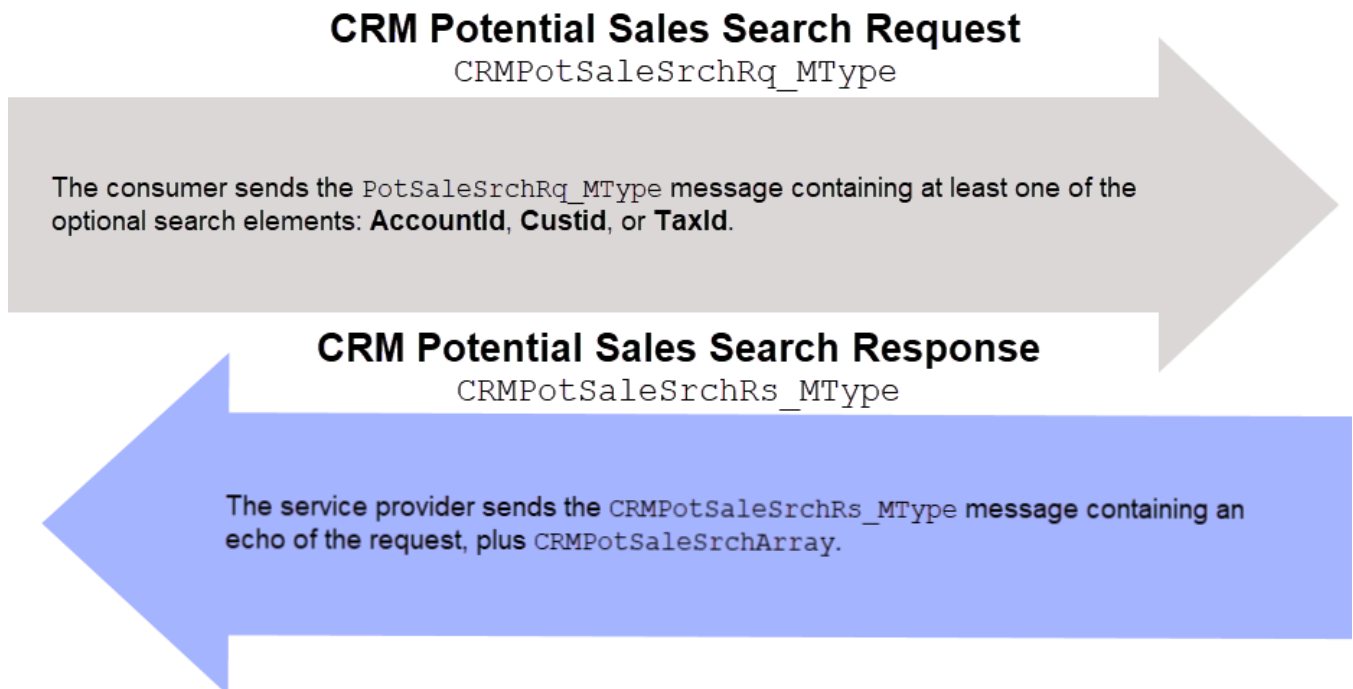
When more than one filter exists on the request, the resulting selection is based on the combined effect of the filters (i.e., "and" operator). Each added filter option further restricts

the result set.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

This service supports the **MaskVal** attribute.

## Message Flow



## Request

The third-party consumer forwards the `CRMPotSaleSrchr` request message to the service provider.

The following general errors or warnings may occur with the `CRMPotSaleSrchr` service. Errors that pertain specifically to an element are listed with that element.

Error Id	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8069	Error	<i>For searches, at least one of the optional parameters must be provided. For modifications, at least one field must be updated.</i>

### AccountId (Optional)

This complex element contains the following elements.

#### AcctId (Optional)

This element represents a valid deposit, loan, or additional service account number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8000	Error	<i>AcctID is required when an AcctType has been passed.</i>
8086	Error	<i>SrchType is not supported for element.</i>

#### AcctType (Optional)

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria. If **AcctId** is provided, **AcctType** must also be

provided.

The following partial XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** represents the value to be sent in this element.
- **ElemCanocValDesc** represents a friendly description of the value stored in **ElemCanocVal**.

```
<SvcDictInfoRec>
  .
  .
  .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>2</ElemCanocVal>
      <ElemCanocValDesc>Checking Account</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>13</ElemCanocVal>
      <ElemCanocValDesc>Credit Line</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  .
  .
  .
</SvcDictInfoRec>
```

## CustId (Optional)

This optional element represents a valid client or additional service only client portfolio within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

## TaxId (Optional)

This optional element represents a valid client, additional service only client, or prospect Social Security Number or tax ID within the Synapsys database.

This element supports only the *Exact Match* search attribute, meaning an exact match must result to satisfy the entered criteria.

## Response

The service provider (Synapsys) returns the `CRMPotSaleSrch` response message to the service consumer, which returns a list of potential sales opportunities that meet the

specified search criteria.

The following arrays are contained within the `CRMPotSaleSrch` response message.

## **CRMPotSaleSrchArray**

This element returns an array of responses for the Potential Sales Search and includes the `CRMPotSaleSrchRec` complex element for each potential sale opportunity that is returned.

## **CRMPotSaleSrchRec**

The `CRMPotSaleSrchRec` complex element contains a package of data related to a Synapsys potential sale opportunity and includes the following simple elements.

## **CRMPotSaleInfoRec**

The `CRMPotSaleInfoRec` complex element contains a package of data related to a Synapsys potential sale opportunity and includes the following simple elements.

# PotSaleSumRmk

# PotSaleSumRmk

This element contains an extended description of the Synapsys potential sale opportunity.

# PotSaleProdArray

# PotSaleProdArray

This element returns an array of accounts that are related to the potential sales opportunity and includes the `PotSaleProdRec` complex element for each related account.

# PotSaleProdRec

# PotSaleProdRec

The `PotSaleProdRec` complex element contains a package of data related to an account that is associated with the potential sales opportunity.

# AcctType

# AcctType

This element represents a valid deposit, loan, or additional service application number within the Synapsys database.

# AcctTypeDesc

# AcctTypeDesc

This element represents the descriptive name of a valid deposit, loan, or additional service that is associated with the referral activity.

# CRMProdCode

# CRMProdCode

This element represents a specific type of deposit, loan, or additional service associated with the referral activity.

# CRMProdDesc

# CRMProdDesc

This element represents the descriptive name of the type of deposit, loan, or additional service associated with the referral activity.

## **EventCatCode**

This element represents the type of sales event designated for the potential sales opportunity.

## **TaxId**

This element represents the customer's Social Security Number or tax ID.

## **CustId**

This element represents the customer's portfolio.

## PotSaleId

This element represents the unique ID assigned to the Synapsys potential sale opportunity.

## PotSaleDesc

This element is a brief description of the Synapsys Potential Sale Opportunity.

# CRM Lobby Queue Services

Synapsys has messaging services for the addition, search, inquiry, and modification of lobby queue information on service providers.

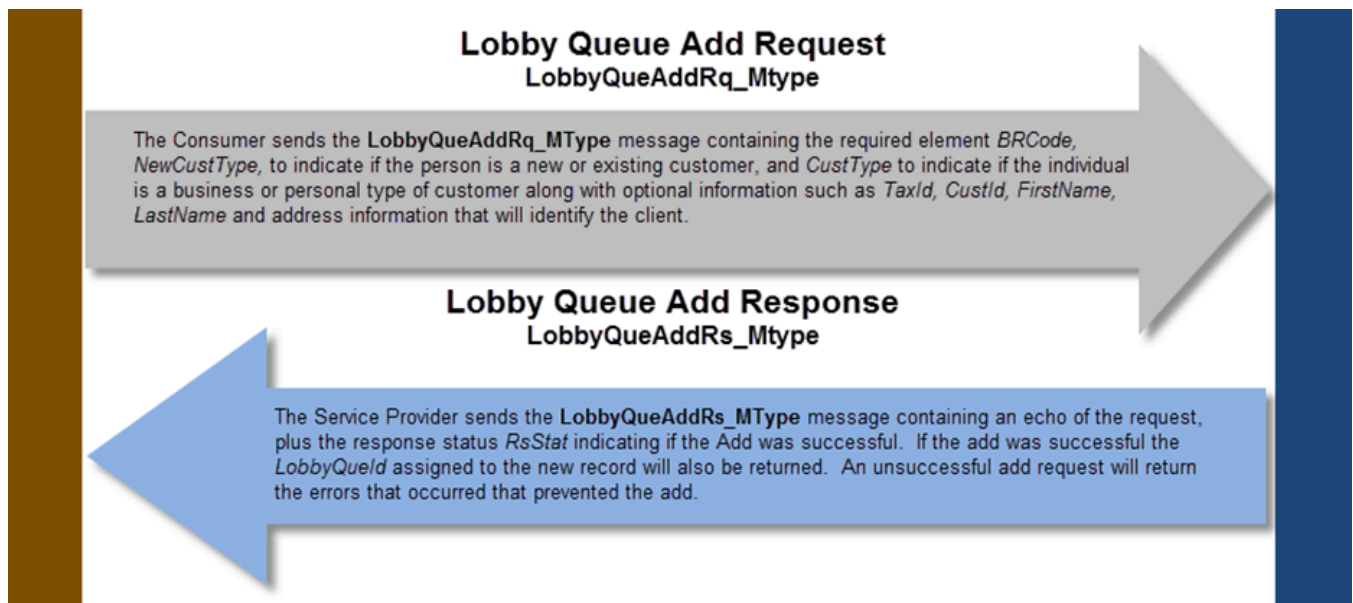
## CRM Lobby Queue Add

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMLobbyQueueAdd

The CRM lobby queue add service allows the service consumer to add a record to the lobby queue in the Synapsys database. The consumer must provide a valid **BrCode**.

## Message Flow



## Request

The third-party consumer forwards the `CRMLobbyQueueAdd` request message to the service provider.

The following general errors or warnings may occur with the `CRMLobbyQueueAdd` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8200	Error	<i>The officer permission AllowLobbyQueueView is set to False.</i>

## LobbyQueInfoRec (Required)

The `LobbyQueInfoRec` complex element contains a package of data related to the lobby queue and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8129	Error	<i>This element is required.</i>

## BrCode (Required)

This element represents the branch.

The following errors, warnings, or faults may occur with this element.

<b>Error ID</b>	<b>Category</b>	<b>Description</b>
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

<SvcDictInfoRec>
. . .
<ElemCanocArray>
  <ElemCanocRec>
    <ElemCanocVal>102</ElemCanocVal>
    <ElemCanocValDesc>Trust Branch</ElemCanocValDesc>
    <CanocValInfoArray>
      <CanocValInfo>
        <CanocValDetail>HeaderLabel</CanocValDetail>
        <CanocValTxt>East Side Branch</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>Step1Label</CanocValDetail>
        <CanocValTxt>Cutomer Type</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>NewCustTypeExistingClientLabel</CanocValDetail>
        <CanocValTxt>Existing</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>NewCustTypeNewClientLabel</CanocValDetail>
        <CanocValTxt>New Client</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>Step2Label</CanocValDetail>
        <CanocValTxt>Cutomer Class</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CustTypeIndividualLabel</CanocValDetail>
        <CanocValTxt>Individual</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CustTypeBusinessLabel</CanocValDetail>
        <CanocValTxt>Business</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>Step3Label</CanocValDetail>
        <CanocValTxt>Client Information</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CustIdLabel</CanocValDetail>
        <CanocValTxt>Member Number</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>TaxIdValidationMessage</CanocValDetail>
        <CanocValTxt>Incorrect SSN was entered</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CustIdValidationMessage</CanocValDetail>
        <CanocValTxt>Incorrect Member Number was entered</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>Step4Label</CanocValDetail>
        <CanocValTxt>Purpose</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>UserDefTxtLabel</CanocValDetail>
        <CanocValTxt>Reason for visit</CanocValTxt>
      </CanocValInfo>
      <CanocValInfo>
        <CanocValDetail>CompletionMessage</CanocValDetail>
        <CanocValTxt>Thank you! The next available rep will be with you shortly</CanocValTxt>
      </CanocValInfo>
    </CanocValInfoArray>
  </ElemCanocRec>
</ElemCanocArray>
. . .
</SvcDictInfoRec>

```

## NewCustType (Required)

This element represents the type of customer.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>C</ElemCanocVal>
      <ElemCanocValDesc>Client</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>P</ElemCanocVal>
      <ElemCanocValDesc>Prospect</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### CustType (Optional)

This element indicates if the record is a business or personal type of client.

Canonical values are:

- *P* (personal)
- *B* (business)

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service

Dictionary Search response for this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>P</ElemCanocVal>
      <ElemCanocValDesc>Personal</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>B</ElemCanocVal>
      <ElemCanocValDesc>Business</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### TaxId (Optional)

This element represents the Social Security Number or tax ID of the prospective customer.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

**CAUTION**

If the **Show SSN Input** option is not selected in Lobby Settings, this element is not supported.

This element allows for a maximum of 9 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>

## CustId (Optional)

This element represents a valid Client or Additional Service Only client portfolio within the Synapsys database. For Symitar only, it may represent the MBR number.

### CAUTION

If the **Show Client Number Input** option is not selected in Lobby Settings, this element is not supported.

This element allows for a maximum of 20 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

## Name (Optional)

This complex element contains the following elements.

### FirstName (Optional)

This element represents the customer's first name.

### CAUTION

If the **CustType** is *B* (business), this element is not supported. Business names must be sent in the **LastName** element.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

### **LastName (Optional)**

This element represents the custom's last name or a business name.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### **Addr (Optional)**

This complex element contains the following elements.

#### **StreetAddr1**

This element represents the first line of the client's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## StreetAddr2

This element represents the second line of the client's address.

This element allows for a maximum of 40 characters.

The following error codes are valid for this request message.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

## City

This element represents the city associated with the client.

### NOTE

This field is only supported when the **CntryType** is blank or *US*.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8125	Error	<i>The max size has been exceeded for this element.</i>

## StateCode

This element represents the state that the client resides in.

This element is only available when **CountryType** = *US* or is blank.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>
8128	Error	<i>The element value provided is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>ID</ElemCanocVal>
      <ElemCanocValDesc>Idaho</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>SD</ElemCanocVal>
      <ElemCanocValDesc>South Dakota</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### PostalCode

This element represents the ZIP code associated with the client.

**NOTE**

This field is only supported when the **CentryType** is blank or *US*.

This element allows for a maximum of 10 characters.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>

Error Id	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>
8128	Error	<i>The element value provided is invalid.</i>

### CntryType

This element represents the two-digit code associated with the country that the client resides in.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>US</ElemCanocVal>
      <ElemCanocValDesc>United States</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### StreetAddr3

This element represents the third line of the client's address.

This element allows for a maximum of 40 characters.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8125	Error	<i>The max size has been exceeded for this element.</i>

### **Cmnt (Optional)**

This element represents any comments.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8053	Warning	<i>This element is not supported for this service.</i>

### **EventCatCode (Optional)**

This element represents the type of event.

#### **NOTE**

Because there can only be a single service event category for the bank or branch, the consumer does not need to provide it.

### **EventOffCode (Optional)**

This element represents the code for the associate whom the event is assigned to.

#### **NOTE**

Because the **EventOffCode** is based off the service event category for the bank or branch, there is no need for the consumer to provide it.

### **UserDefinedArray (Required)**

This complex element contains the following elements.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8092	Error	<i>The record count of User Defined elements is invalid for this service.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>

### UserDefInfo (Optional)

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

## UserDefTxt

## UserDefTxt

This element represents the **PurposeId** of the selected reason for the visit.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8138	Fault	<i>A required user defined field was not supplied.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>101</ElemCanocVal>
      <ElemCanocValDesc>Mortgage Loan</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

## Response

The service provider (Synapsys) returns the `LobbyQueueAdd` response message to the service consumer, which contains the following simple elements.

### RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

- **ElemCanocVal** and **ElemCanocValDesc** represent the value to be sent in this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>success</ElemCanocVal>
      <ElemCanocValDesc>success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>fail</ElemCanocVal>
      <ElemCanocValDesc>fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```

### LobbyQueueId

This element represents the unique ID of the specific service event being returned.

# CRM Lobby Queue Search

Container: TPG\_CustomerMaster.xsd

## Message: CRMLobbyQueSrch

The CRM lobby queue search service returns all events for a particular **InstRtId**, based on specified filter criteria. The request provides the following filter:

- **BrCode** (required)

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The Rstr attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

## Message Flow



## Request

The third-party consumer forwards the `CRMLobbyQueSrch` request message to the service provider.

The following general errors or warnings may occur with the `CRMLobbyQueSrch` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8200	Error	<i>The officer permission AllowLobbyQueueView is set to False.</i>

## BrCode (Required)

This element represents the branch.

When **VisibleInLobbyTracking** is set to `(0) Visible-False`, **BrCode** is not supported.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

## Response

The service provider (Synapsys) returns the `LobbyQueueSearch` response message to the service consumer, which contains the following simple elements.

### BrCode

This element represents the branch and is available on the user interface based on the

system setting **VisibleInLobbyTracking**.

## **LobbyQueueStatCode**

This element represents the status code of the lobby queue.

### **NOTE**

This element is not supported in the search.

## **LobbyQueSrchArray**

This element returns an array of responses for the lobby queue search and includes the `LobbyQueSrchRec` complex element for each lobby queue record returned.

## **LobbyQueSrchRec**

The `LobbyQueSrchRec` complex element contains a package of data related to a Synapsys lobby queue and includes the following simple elements.

## **LobbyQueId**

This element represents the unique ID of the specific lobby queue event being returned.

## **Name**

This complex element contains the following elements.

# ComName

# ComName

This element represents the customer's full name.

# FirstName

# FirstName

This element represents the customer's first name.

# LastName

# LastName

This element represents the customer's last name.

## PersonName

`PersonName` contains a collection of simple elements.

## Addr

This complex element contains the following simple elements.

# StreetAddr1

# StreetAddr1

This element represents the first line of the client's address.

# StreetAddr2

# StreetAddr2

This element represents the second line of the client's address.

# City

# City

This element represents the city associated with the client.

This element is only available when **CountryType** = *US* or is blank.

# StateCode

# StateCode

This element represents the state that the client resides in.

This element is only available when **CountryType** = *US* or is blank.

# PostalCode

## PostalCode

This element represents the ZIP code associated with the client.

This element is only available when **CountryType** = *US* or is blank.

# Cntry

## Cntry

This element represents the full name of the country that the client resides in.

# CntryType

## CntryType

This element represents the two-digit code associated with the country that the client resides in.

# StreetAddr3

## StreetAddr3

This element represents the third line of the client's address.

# Ver\_2

## Ver\_2

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

### **NewCustType**

This element represents the type of customer.

### **CustId**

This element represents the customer's portfolio.

### **TaxId**

This element represents the Social Security Number or tax ID of the customer.

### **CustType**

This element indicates if the record is a business or personal type of client.

Canonical values are:

- *P* (personal)
- *B* (business)

### **BrCode**

This element represents the branch and is available on the user interface based on the system setting **VisibleInLobbyTracking**.

### **BrDesc**

This element represents a descriptive name of the **BrCode**.

### **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

### **EventOffDesc**

This element represents the descriptive name for the **EventOffCode**.

### **LobbyQueStatCode**

This element represents the status code of the lobby queue event.

### **LobbyQueStatDesc**

This element represents a descriptive name of the **LobbyQueStatCode**.

## **QueEntryTimeDt**

This element represents the date and time the lobby queue service was added.

## **UserDefInfoArray**

This array contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefInfo

# UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

# UserDefTxt

This element represents the value to be associated with the **UserDefCode** that is included with the event.

# UserDefCode

# UserDefCode

This element represents the unique identifier assigned to a user-defined field that is associated with the event.

# UserDefDesc

# UserDefDesc

This element represents the description of the additional information that is related to the event.

# Ver\_1

# Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## CRM Lobby Queue Inquiry

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMLobbyQueInq

The CRM lobby queue inquiry service returns element details for a specific lobby record. The **LobbyQueld** element is required on the request.

The design of the inquiry was created in a manner that facilitates addition and modification requests. The intention element **ActIntent** was added to support the concurrency model for modifications made to activity information.

The activity inquiry service uses a typical exchange of `Mtype` messages to retrieve profile information for a specific activity, based on the activity ID and the type of activity. If the activity ID is not known, the consumer must first perform an activity search to obtain the activity ID for the desired activity.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

The **Rstr** attribute has been implemented for this service. See *Rstr Attribute Behavior* for more information.

## Message Flow



## Request

The third-party consumer forwards the `CRMLobbyQueInq` request message to the service provider.

The following general errors or warnings may occur with the `CRMLobbyQueInq` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8200	Error	<i>The officer permission AllowLobbyQueueView is set to False.</i>

## LobbyQueueId (Required)

This element represents the unique ID of the specific Lobby record being returned.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8009	Warning	<i>No record(s) were found for the request received.</i>
8129	Error	<i>This element is required.</i>

## ActIntent (Optional)

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8013	Error	<i>ActIntent is invalid.</i>

## Ver\_1 (Optional)

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## Response

The service provider (Synapsys) returns the `LobbyQueInq` response message to the service consumer, which contains the following simple elements.

### ActIntent

This indicator conveys the service consumer's intention for a subsequent operation for the data set included in the response.

Canonical values are:

- *ReadOnly* (Default) - Indicates a view intent only for the data set included in the inquiry response.
- *Upd* - Indicates the intention to perform a subsequent modification to the data set included in the inquiry response.
- *Del* - Indicates the intention to perform a subsequent delete of the data set included in the inquiry response.

### ActIntentKey

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

### LobbyQueInqRec

This complex element contains a package of data related to the lobby queue and includes the following arrays and elements.

## **LobbyQueId**

This element represents the unique ID of the specific Lobby record being returned.

## **LobbyQueInfoRec**

The `LobbyQueInfoRec` complex element contains a package of data related to the lobby queue and includes the following elements.

### **BrCode**

This element represents the branch.

### **NewCustType**

This element represents the type of customer (client or prospect).

### **CustType**

This element indicates if the record is a business or personal type of client.

Canonical values are:

- *P* (personal)
- *B* (business)

### **TaxId**

This element represents the Social Security Number or tax ID of the customer.

The *MaskVal* attribute value is set according to the system setting **MaskSSN**.

### **CustId**

This element represents a valid Client or Additional Service Only client portfolio within the Synapsys database. For Symitar only, it may represent the MBR number.

### **Name**

This complex element contains the following elements.

# ComName

## ComName

This element represents the customer's full name.

# FirstName

## FirstName

This element represents the customer's first name.

# LastName

## LastName

This element represents the custom's last name or a business name.

### **Addr**

This complex element contains the following simple elements.

# StreetAddr1

## StreetAddr1

This element represents the first line of the client's address.

# StreetAddr2

## StreetAddr2

This element represents the second line of the client's address.

# City

## City

This element represents the city associated with the client.

This element is only available when **CountryType** = *US* or is blank.

## StateCode

## StateCode

This element represents the state that the client resides in.

This element is only available when **CountryType** = *US* or is blank.

## PostalCode

## PostalCode

This element represents the ZIP code associated with the client.

This element is only available when **CountryType** = *US* or is blank.

## Cntry

## Cntry

This element represents the full name of the country that the client resides in.

## CntryType

## CntryType

This element represents the two-digit code associated with the country that the client resides in.

## StreetAddr3

## StreetAddr3

This element represents the third line of the client's address.

## Ver\_2

# Ver\_2

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **Cmnt**

This element represents any comments.

## **EventCatCode**

This element represents the type of event.

## **EventOffCode**

This element represents the code for the associate whom the event is assigned to.

## **LobbyQueStatCode**

This element indicates if the record is visible in the Lobby Queue of Synapsys Desktop.

## **UserDefInfoArray**

This array contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefInfo

# UserDefInfo

This element contains a collection of simple elements. If any records exist within the array, the simple elements listed must be provided.

# UserDefTxt

# UserDefTxt

This element represents the unique ID for the purpose of the visit.

# UserDefCode

# UserDefCode

This element represents the unique ID for the **Purpose** field.

# UserDefDesc

# UserDefDesc

This element represents the description of the purpose.

# Ver\_1

# Ver\_1

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

## **BrDesc**

This element represents a descriptive name of the **BrCode**.

## **EventOffDesc**

This element represents the descriptive name for the **EventOffCode**.

## **LobbyQueStatDesc**

This element represents a descriptive name of the **LobbyQueStatCode**.

## **QueEntryTimeDt**

This element represents the date and time the lobby queue record was added.

## **Ver\_1**

This element represents a version in the XML schema. If any elements are included following this element, then this element must be present.

# CRM Lobby Queue Modify

**Container:** TPG\_CustomerMaster.xsd

**Message:** CRMLobbyQueMod

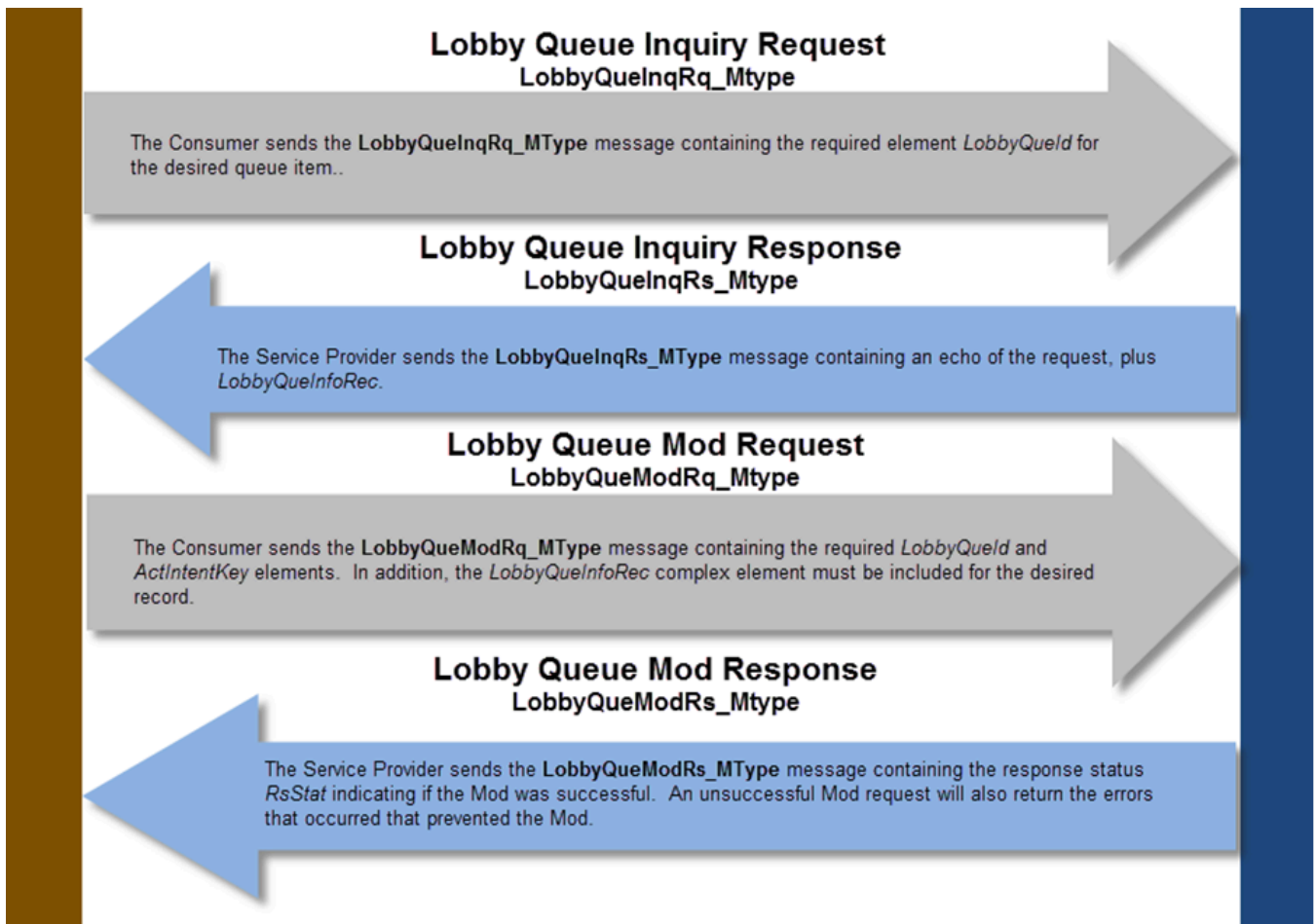
The CRM Lobby Queue modify feature allows the service consumer to modify certain elements for a specific Lobby record.

The Lobby Queue modification service uses a typical exchange of `MtType` messages to allow updates to the information for a specific record, based on the Lobby ID. A Lobby Inquiry must be performed prior to the modification request to retrieve the activity intent key necessary for modification operations.

The elements at the root request message are echoed back at the root response, regardless of whether those same elements exist in the repeating complex.

Additional information for each element can be obtained through a Service Dictionary Search request. XML examples are provided for elements that have additional information returned in the `SvcDictInfoArray` of the Service Dictionary Search.

## Message Flow



## Request

The third-party consumer forwards the `CRMLobbyQueMod` request message to the service provider.

The following general errors or warnings may occur with the `CRMLobbyQueMod` service. Errors that pertain specifically to an element are listed with that element.

Error ID	Category	Description
8196	Error	<i>The officer permission AllowRelEx is set to False.</i>
8200	Error	<i>The officer permission AllowLobbyQueueView is</i>

Error ID	Category	Description
		<i>set to False.</i>

### LobbyQueueId (Required)

This element represents the unique ID of the visitor.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>
8129	Error	<i>This element is required.</i>

### LobbyQueInfoRec (Required)

The LobbyQueInfoRec complex element contains a package of data related to the lobby queue and includes the following elements.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8129	Error	<i>This element is required.</i>

### LobbyQueStatCode (Required)

This element indicates if the record is visible in the Lobby Queue of Synapsys Desktop.

The following errors, warnings, or faults may occur with this element.

Error ID	Category	Description
8128	Error	<i>The element value provided is invalid.</i>

Error ID	Category	Description
8129	Error	<i>This element is required.</i>

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```

SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>true</ElemCanocVal>
      <ElemCanocValDesc>true</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>>false</ElemCanocVal>
      <ElemCanocValDesc>>false</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>

```

### ActIntentKey (Required)

This element represents the provider key delivered to the service consumer via a preceding inquiry request to be submitted in the modification request operation.

The following errors, warnings, or faults may occur with this element.

Error Id	Category	Description
8014	Error	<i>ActIntentKey is required.</i>

### Response

The service provider (Synapsys) returns the `LobbyQueMod` response message to the service consumer, which contains the following simple elements.

## RsStat

This element specifies the status of the modification request.

Canonical values are:

- *Success*
- *Fail*

The following XML example shows what is returned in the `SvcDictInfoArray` of the Service Dictionary Search response for this element.

```
<SvcDictInfoRec>
  . . .
  <ElemCanocArray>
    <ElemCanocRec>
      <ElemCanocVal>success</ElemCanocVal>
      <ElemCanocValDesc>success</ElemCanocValDesc>
    </ElemCanocRec>
    <ElemCanocRec>
      <ElemCanocVal>fail</ElemCanocVal>
      <ElemCanocValDesc>fail</ElemCanocValDesc>
    </ElemCanocRec>
  </ElemCanocArray>
  . . .
</SvcDictInfoRec>
```