

CHILLIDB INTEGRATION SERVICES API

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Overview

ChilliDB Integration Services is the name given to a set of XML based Web Services which facilitate integration and data exchange between ChilliDB and software solutions developed both by Polymorphic Solutions and third parties.

This document will provide an API (Application Programming Interface) reference to aid developers in utilising ChilliDB Integration Services including details about the arguments and responses for each method.

1 ChilliDB Web Service Coverage

The following table summarises the areas within ChilliDB which have web service coverage offering either Read and/or Write functionality. The Auxiliary access provides additional support for non-data retrieval or update functionalities for instance checking the user login.

ChilliDB Section	Read Access	Write Access	Auxiliary Access
System Core			
Core Data	✓	✗	✓
Configuration			
Core Data	✓	✗	✗
Users			
Core Data	✓	✗	✗
Contacts			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Communication Data	✓	✓	✗
Address Data	✓	✓	✗
Contact Roles	✓	✓	✗
Organisations			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗

Communication Data	✓	✓	✗
Address Data	✓	✗	✗
Notes			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Distribution Lists			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Events			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✓	✗
Event Sessions			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Event Registrations			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Communications			
Core Data	✓	✗	✗
Reference Data	✓	✗	✗
Notifications			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗

Cases			
Core Data	✓	✓	✓
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Generic Data			
Core Data	✓	✗	✗
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Documents			
Core Data	✓	✓	✗
Custom Fields	✓	✗	✗
Donations			
Core Data	✓	✓	✓
Reference Data	✓	✗	✗
Custom Fields	✓	✗	✗
Memberships			
Core Data	✓	✓	✗
Custom Fields	✓	✗	✗
Client Administration			
Core Data	✓	✓	✗
Reference Data	✓	✗	✗
Staff Tracking			
Core Data	✓	✓	✗

1.1 Basic Data Type Convention

ChilliDB uses its own conventions and rules when is working with basic data types such as text, number, conditional true/false or date and time. The following conventions and rules apply to the web services described in this document.

Data Type	Description and Rules
Integer	<ol style="list-style-type: none"> 1. Represents an absolute number (without any decimal point values). 2. When represents a record identifier within the system, the number must be higher than zero (0) and must exist within ChilliDB system. 3. A value of -99 represents a NULL value or meaning that the value does not exist.
Decimal	<ol style="list-style-type: none"> 1. Represents a decimal point values. 2. A value of -99.00 represents a NULL value or meaning that the value does not exist.
Char	Represents a single text character.
String (N)	Represents a text value. N represents the maximum number of characters allowed for the field. If N is not defined, any number of characters is allowed in that field.
Boolean	Represents a value of <i>true</i> or <i>false</i> .
DateTime	<ol style="list-style-type: none"> 1. Represents a date and time values. 2. The format of the value: <i>yyyy-mm-ddThh:MM:ss</i> yyyy: year in 4 digit format (e.g. 2010) mm: month in 2 digit format (e.g. 01, 02, 10, 11) dd: day in 2 digit format (e.g. 01, 11, 21, 31) T: the time separator for the date and time values. hh: hour in 24-hour format (e.g. 00, 02, 13, 14, 23) MM: minute in 60 minutes format (e.g. 00, 05, 10, 15, 59) ss: second in 60 seconds format (e.g. 00, 05, 10, 15, 59) <u>Example:</u> 2010-12-22T08:30:00 3. A value of 1001-01-01T00:00:00 represents a NULL value or meaning that the value does not exist.

1.2 Additional ChilliDB Pre-Defined Types

ChilliDB provides a number of pre-defined types which are used in its large web service operations to support the existing basic data types. The following types are described below:

Data Type	Description and Rules
ExpireStatus	Represents the expiry status of a ChilliDB record as <code>Current</code> , <code>Expired</code> or <code>All</code>
SelectExpired	Represents the expiry status to be used as a filter when selecting ChilliDB records. The values represented are <code>NotExpired</code> , <code>ExpiredOnly</code> or <code>All</code>
CommunicationType	Represents the type of the Communication record as <code>Email</code> , <code>MobilePhone</code> , <code>Fax</code> , or <code>Other</code> .
Data_Type	Represents the Custom Fields field type. The following are list of the available types: <ul style="list-style-type: none"> • <code>Asset</code> • <code>Case</code> • <code>Contact</code> • <code>Currency</code> • <code>Custom_List</code> • <code>Date</code> • <code>DateTime</code> • <code>Decimal</code> • <code>Document</code> • <code>Duration</code> • <code>Event</code> • <code>Event_Session</code> • <code>File</code> • <code>Hyperlink</code> • <code>Identification_Number</code> • <code>Integer</code> • <code>Label</code> • <code>Link</code> • <code>Lookup</code> • <code>Note</code> • <code>Organisation</code> • <code>QI_Module</code> • <code>Quality_Improvement</code> • <code>Resource</code> • <code>Statistical Linkage Key (SLK-581)</code>

	<ul style="list-style-type: none"> • Text • Time • YesNo
CommunicationEntityType	Represents Contact, Organisation or Client to be linked to the Communication item.
Alert_Type	<p>Represents the type of Alert item based on the where the Alert is created. The following are list of the available types:</p> <ul style="list-style-type: none"> • Appointment • Case_Management • Client_Administration_Case_Note • Client_Administration_Client_Note • Client_Administration_Financial_Expenditure • Contact • Contract_Deliverable_Due • Contract_Deliverable_Generic • Contract_Deliverable_Review • Contract_Generic • Contract_Opportunity_Due • Contract_Opportunity_Review • Contract_Proposal_Due • Contract_Proposal_Feedback • Contract_Proposal_Review • Distribution_List • Document • Event • Event_Session • Event_Session_Resgistration • Group • Membership • MSOAP • Note • Organisation • Quality_Improvement • Survey
DynamicFieldDataType	<p>Represents the Custom Fields type to be used as a filter when selecting Custom Fields Field records. The values represented are:</p> <ul style="list-style-type: none"> • All • Asset • Case • Contact

	<ul style="list-style-type: none"> • Currency • Custom_List • Date • DateTime • Decimal • Document • Duration • Event • Event_Session • File • Hyperlink • Identification_Number • Integer • Label • Link • Lookup • Note • Organisation • QI_Module • Quality_Improvement • Resource • Statistical Linkage Key (SLK-581) • Text • Time • YesNo
MultipleSelectOption	<p>Represents the Custom Fields selection type to be used as a filter when selecting Custom Fields Field records. The values represented are:</p> <ul style="list-style-type: none"> • All • MultipleSelectOnly • SingleSelectOnly
EventRegistrationStatus	<p>Represents the Event Registration status used as filter in deleting Event Registration records. The values represented are:</p> <ul style="list-style-type: none"> • All • RegisteredNotPaid • Registered • Cancelled • NoShow • Attended
UserClass	<p>Represents the type of access the user has for the system. The values represented are:</p> <ul style="list-style-type: none"> • Full_Access

	<ul style="list-style-type: none"> • Read_Only • External
Client_Type	<p>Represents the type of client for Case Module. The values represented are:</p> <ul style="list-style-type: none"> • None • Organisation • Contact • Client
InteractionMethod	<p>Represents the type of interaction method for the Note record. The values represented are:</p> <ul style="list-style-type: none"> • Unknown • Email • Fax • SMS • Phone • Meeting • Resource • Main • Notation • Visit • Survey

2 Web Service Data Model

ChilliDB contains many data models to store the information and all these structures are made available through the web services. The data models being used in the web services generally conforms to the actual representation of the data shown on ChilliDB screens.

For example: Reference Item data model (called as ReferenceDataItem) shows the information that forms the structure of the Reference Data item, such as Contact Type, Organisation Type, Contact Category, Organisation Sub Category, and other reference data displayed in the Reference Data Maintenance screen within the ChilliDB system.

The following sections show the general data models which are accessible through the web services.

2.1 ReferenceDataItem

The ReferenceDataItem provides the information that forms the generic structure of the Reference Data in ChilliDB system. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Reference Data item assigned by ChilliDB system	
Description	String (100)	The name of the Reference Data item	The value is mandatory.
Help	String (500)	The help description of the Reference Data item	
Parent Identifier	Integer	The identifier that link this item to its parent when this item is a subset of another reference data item	In the circumstance that the Reference Data is a subset of other Reference Data, for example: Category and Sub Category, then the value cannot be empty.
Is Protected	Boolean	Some Reference data are pre-defined by Polymorphic Solutions and they are not changeable by the ChilliDB users. In that sense, these data are protected. <u>Available values:</u> 1 – Protected 0 – Non-Protected (Default)	

Expired	DateTime	The date and time when the Reference Data is no longer available for use within the ChilliDB system	When using the ReferenceDateItem as part of the Insert or Update methods, the value of Expired field should use 1001-01-01T00:00:00 as a value if there is no value to supply for the field.
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2.2 ContactOrganisationResult

The ContactOrganisationResult provides the information about the Contact and Organisation associations which are linked through their identifiers. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Contact Identifier	Integer	The identifier of the Contact	
Organisation Identifier	Integer	The identifier of the Organisation	The value is mandatory
Organisation Is Primary	Boolean	The flag that determines whether the Organisation is the Contact's Primary Organisation	
Description	String	The description of the Contact Full Name followed by the Organisation Name. In some occasions, the description can only show the Organisation Name.	If the Contact Identifier is not supplied, then the Description will only show Organisation Name. This information is not required when saving a Contact item.

2.3 AddressInfo

The AddressInfo provides the information about the address item such as address type, streets, suburb, state, postcode and country. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Address item assigned by ChilliDB system	
Type	ReferenceDataItem	The Address type	<p>The value is mandatory</p> <p>There can be only one Address Type for each Address item owned by a Contact or an Organisation.</p> <p>Attempting to add an Address item for an existing Contact or Organisation which already has the specified Address Type will return an exception as it violates the unique Address Type rule for the Contact's or Organisation's Address items.</p>
Line 1	String (60)	The Address line 1	The value is mandatory
Line 2	String (60)	The Address line 2	
City Town	String (50)	The Address suburb, city, or town	
State	String (100)	The Address state or province	
Postcode	String (10)	The Address postcode	
Country	String (100)	The Address country	
External Id	Array of < String >	The external identifiers defined for the communication item. This field is exclusively used internally by Polymorphic	

		Solutions.	
Latitude	String (100)	The latitude value of the provided address	This is only available for Client Administration Module and only being populated when saving address for a client through a web service call.
Longitude	String (100)	The longitude value of the provided address	This is only available for Client Administration Module and only being populated when saving address for a client through a web service call.

2.4 UserRoleInfo

The UserRoleInfo provides the information about the user roles such as role name, description. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the User Role item assigned by ChilliDB system	
Role Name	String (100)	The name of the Role	The value is mandatory
Role Description	String (255)	The description of the Role	
Is Role Expired	Boolean	Determines whether the Role is expired or not	
Access Id	Integer	The unique identifier of the Access Type or Class of User the Role has	
Access Description	String (100)	The description of the Access Type or Class of User the Role has	

2.5 DynamicDataSection

The DynamicDataSection provides a structure to store and display the Custom Fields field section in ChilliDB. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Section Identifier	Integer	The section identifier	
Section Name	String (50)	The name of the section	The combined name between the Custom Fields Section and Custom Fields Field names shall not exceed 116 characters.
Section Description	String (500)	The description of the section	
Fields	Array of <DynamicDataField>	The collection of Custom Fields fields	
Entity Name	String (128)	The name of the Custom Fields Entity	
Section Order	Integer	The position of the Section within the Custom Fields Entity items	
Section is Protected	Boolean	Status of whether the section is protected or not	
Section Tooltip	String (500)	The Help description of the section	
Section Appearance	String (100)	The layout of the section. Values are either No Section Outline, Collapsed or Expanded	
Number of Items	Integer	The number of Custom Fields within the section.	
RolesWithViewAccess	Array of <UserRoleInfo>	The collection of Roles who has view access to the section data.	

RolesWithAddAccess	Array of < UserRoleInfo >	The collection of Roles who has add access to the section data.	
RolesWithModifyAccess	Array of < UserRoleInfo >	The collection of Roles who has modify access to the section data.	
VisibleForTypes	Array of < ReferenceDataItem >	The collection of entity types who can view the section data.	
DisplayType	String (100)	The structure of how the section will be presented to the application. Values are No Section Outline, Collapsed, Expanded, Tab, Grid	Tab and Grid display types are only available on certain custom field entities.

2.6 DynamicDataField

The DynamicDataField provides a structure to store and display the Custom Fields field information in ChilliDB. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Field Identifier	Integer	The field identifier	
Field Name	String (100)	The name of the field	The combined name between the Custom Fields Section and Custom Fields Field names shall not exceed 116 characters.
Field Description	String (500)	The description of the field	
Section Identifier	Integer	The identifier of the parent section	
Section	DynamicDataSection	The object that represents the Section Identifier	
Data Type	Data_Type	The field type	
Order	Integer	The order of the field within the Custom Field Section	
Is Multiple Select	Boolean	The state to indicate if the field allow multiple value selections.	
Is Required	Boolean	Determines if the value of the field is required or not	
Decimal Places	Integer	The number of decimal places the custom field data can contain	Applicable to Custom Field of type <code>Decimal</code>
Minimum Range	String (50)	For Custom Field of type <code>Text</code> , this determines the minimum number of characters the custom field will allow. For Custom Field of types <code>Integer</code> , <code>Decimal</code> , <code>Currency</code> , <code>Date</code> , <code>DateTime</code> and <code>Time</code> , this determines the minimum value the custom field will access	Applicable to Custom Field of types <code>Text</code> , <code>Integer</code> , <code>Decimal</code> , <code>Currency</code> , <code>Date</code> , <code>DateTime</code> and <code>Time</code>

Maximum Range	String (50)	<p>For Custom Field of type <code>Text</code>, this determines the maximum number of characters the custom field will allow.</p> <p>For Custom Field of types <code>Integer</code>, <code>Decimal</code>, <code>Currency</code>, <code>Date</code>, <code>DateTime</code> and <code>Time</code>, this determines the maximum value the custom field will access.</p>	Applicable to Custom Field of types <code>Text</code> , <code>Integer</code> , <code>Decimal</code> , <code>Currency</code> , <code>Date</code> , <code>DateTime</code> and <code>Time</code>
Identification Number Configuration	< <code>DynamicDataIdentificationNumberConfiguration</code> >	The configuration to be used by the system to generate the Custom Field value.	Applicable to Custom Field of type <code>IdentificationNumber</code>
Values	Array of < DynamicDataValue >	The collection of Custom Fields Field values.	
Expiry Date	DateTime	The expiry date of Custom Fields field	
Lookup Items	Array of < DynamicDataLookupItem >	The collection of available item options (key and value pairs) from the lookup type field.	These items will be populated only if the Custom Fields Field type is <code>Lookup</code> , <code>Resource</code> , and <code>Custom_List</code>
Instance	Integer	A unique value that can be used to group Custom Fields values if those values belong to Custom Fields field for Custom Fields Section of layout type "GRID".	
Custom Time Format	Integer	Determines if the Custom field will collect actual time value (1) or number of hours and minutes (2).	Applicable to Custom Field of type <code>Time</code>
Is Calculated	Boolean	Determines if the Custom field is a calculated field or not.	

2.7 DynamicDataValue

The DynamicDataValue provides a structure to store and display the values stored against Custom Fields fields in ChilliDB. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Record Identifier	Integer	The record identifier in which the values are linked	The value is mandatory
Value	Array of <Object>	<p>One or more values linked to the Custom Fields field and the ChilliDB records.</p> <p>The returned value can be one of the following objects depending on the data type configured on that Custom Fields field:</p> <ul style="list-style-type: none"> • Boolean for Yes/No type • Integer for Whole Number type. • Decimal for Currency and Decimal types. • DateTime for Date and Date & Time types. • OrganisationItem for Organisation live data type. • ContactInfo for Contact live data type. • NoteInfo for Note live data type. • EventInfo for Event live data type. • EventSessionInfo for Event Session live data type. • EventRegistrationInfo for Event Registration live data type. • DynamicDataLookupItem for Lookup, Resource, and Custom List types. • FileAttachmentItem for File Attachment type. 	The value is mandatory

2.8 DynamicDataIdentificationNumberConfiguration

The DynamicDataIdentificationNumberConfiguration provides a structure or definition on how the value of the Custom Field of type IdentificationNumber is to be generated by the system. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Id	Integer	The Custom Field Identifier this configuration is for	The value is mandatory
Id Number Format	Integer	Determines if the base Identification Number is System	The value is mandatory

		Generated or User Supplied	
Uses Prefix	Boolean	Determines if a prefix value will be added into the base Identification Number or not to generate the final Identification Number	The value is mandatory
Prefix Value	String	The prefix value to be added on the base Identification Number to generate the final Identification Number	
Uses Suffix	Boolean	Determines if a suffix value will be added into the base Identification Number or not to generate the final Identification Number	The value is mandatory
Suffix Value	String	The suffix value to be added on the base Identification Number to generate the final Identification Number	
Default Value	String	The default value of the base Identification number	
Current Incremented Value	Integer	A value used in generating System Generated Identification number	
Uses Padding	Boolean	Determines if padding will be applied to the base Identification Number to generate the final Identification Number	The value is mandatory
Padding Length	Integer	The number of characters to be padded into the base Identification Number to generate the final Identification Number	

2.9 DynamicDataLookupItem

The DynamicDataLookupItem provides a structure to store and display the option values of Custom Fields with Lookup type in ChilliDB. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Lookup Identifier	Integer	The option identifier in which the lookup value is linked	The value is mandatory
Lookup Value	String (150)	The lookup value	The value is mandatory

2.10 DynamicSearchField

The DynamicSearchField provides a structure to hold information when searching ChilliDB record by Dynamic Data. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Field Identifier	Integer	The field identifier	
Field Value	Object	The object representing a Field value	
Field Lower Value	Object	The object representing a Field lower value	The property is used when searching for a range of Values
Field Upper Value	Object	The object representing a Field upper value	The property is used when searching for a range of Values

2.11 FileAttachmentItem

The FileAttachmentItem provides a structure to store and display the values of Custom Fields fields with File Attachment type in ChilliDB. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
ID	Integer	The system generated unique identifier for the file record.	The value is mandatory

Original Name	String (255)	The name of the file.	The value is mandatory
Size	Integer	The size of the file in bytes.	The value is mandatory
Content Type	String (100)	<p>The file content type in MIME standards.</p> <p>The supported MIME type is stored in ChilliDB configuration settings which can be found by going to the <i>System Configuration Settings</i> screen under ChilliDB system.</p>	The value is mandatory
File Download URL	String	The URL of the file.	

3 Authentication Information

Because the API will be restricted to registered clients of ChilliDB, each web request made via ChilliDB web services requires an authentication token in order to be able to gain access to the data stored in the ChilliDB system.

The following client information is required when making a request to the ChilliDB web services:

- *System Identifier*: a unique Identifier which identifies the database to use for data retrieval. Open a web browser and log in to ChilliDB.

If you have more than one system available on the login screen, then you should be aware that each of these systems will have its own unique identifier so you should be sure you log into the system that you intend to use from your web services.

This value for this setting can be found by logging into your ChilliDB system and then navigating to the *System* menu > *System Management* > *Manage*. Then select the *Display/Refresh System Configuration* link. Locate the "Setting" called "System Identifier" in the grid and your unique identifier will be visible in the "Value" column.

- *Username*: describes the ChilliDB Username required to access that system.
- *Password*: describes the password associated with the ChilliDB username to access that system.

Polymorphic Solutions recommends that you use a Named User license rather than a Concurrent User License when connecting to our Web Services. Concurrent Users can be blocked if the system is using all of its licenses. If your system has no available Concurrent User License, your Web Services will fail to connect. A Named User License is never blocked from accessing ChilliDB.

When making a web service SOAP request, the XML document structure contains the header information which is used to embed the authentication token.

SOAP Request

```
[...omitted...]

<soap:Header>
  <AuthenticationHeader
    xmlns="http://chillidb.com/IntegrationServices/DataExchange/ContactManager">
    <SystemIdentifier>CHILLIDB_PRODUCTION</SystemIdentifier>
    <Username>user</Username>
    <Password>user password</Password>
  </AuthenticationHeader>
</soap:Header>

[...omitted...]
```

Note:

There is exclusion for web methods defined in the [SystemCore](#) web service as they can be executed without specifying the authentication header.

4 Troubleshooting

When the web service execution does not return a result or instead showing an error message, please follow these steps to resolve the issue:

1. Some of the error messages are generic and can be resolved by fixing up the web service request. These error messages are listed below:

Error Message	Resolutions
<i>System.Web.Services.Protocol. SoapException: Server was unable to process request. ---> System.NullReferenceException: Object reference not set to an instance of an object. [... omitted ...]</i>	<p>The authentication information details are not provided or invalid.</p> <p>Please specify the correct System Identifier (SID), Username, and Password. The Username and Password should be the same username and password which are used to log into ChilliDB system.</p> <p>If the SID is not known, the GetClientSystemList() web method from the SystemCore web service will provide this information through its ClientSystemInfo result.</p>
<i>WebException: The request failed with HTTP status 404: Not Found.</i>	<p>The targeted web service URL is not correctly specified or it's not accessible.</p> <p>Please check the URL again to ensure that it's correct and accessible by typing the URL into the internet web browser first before applying it into the SOAP request.</p>

2. If the resolution in the above table does not resolve the error or if the error message are not listed above, then copy the error message on the screen along with the sample of XML request that caused the error into an email message and send them to the ChilliDB support team at support@chillidb.com.

5 Available Web Services

ChilliDB provides Integration Services for many of its' modules which are documented below.

Additional .Net generated documentation can be accessed using your web browser by navigating to the URL for each of the web services defined in the sections below.

5.1 SystemCore

The System Core Web Service provides the facility to retrieve the client system information such as the Client System Identifier and its description. The web service also provides the web method to check the user login.

The list of Web Service methods for SystemCore can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/SystemCore.aspx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The System Web Service uses a web service data model called ClientSystemInfo which is described below:

5.1.1 ClientSystemInfo

The ClientSystemInfo provides the information about the client system to connect some of the ChilliDB services into. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Client System information assigned by ChilliDB system	
System Identifier	String (10)	The unique identifier assigned to the Client system.	
Description	String (50)	The description of the Client system.	

5.1.2 SystemEntityInfo

The SystemEntityInfo provides the information about the entities in the system such as Contact or Organisation.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the system entity	
Name	String (128)	The name of the system entity	
Description	String (128)	The description of the system entity	
Module	Integer (50)	The module identifier to which the system entity is attached to	

5.1.3 CustomFieldEntityInfo

The CustomFieldEntityInfo provides the information about the dynamic field entities in the system such as Contact or Organisation.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the system entity	
Name	String (128)	The name of the system entity	
Description	String (128)	The description of the system entity	
Module	Integer	The module identifier to which the system entity is attached to	

In term of the operation support, the System Core Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for System Core Web Service

Method Signature	Return	Description
GetClientSystemList()	Array of < ClientSystemInfo >	Get the available Client Systems.
CheckLogin(String, String, String)	Boolean	Check the user login.
GetSystemEntities()	Array of < SystemEntityInfo >	Get the available Entities in the system which the client has licensed to.
GetCustomFieldEntities()	Array of < CustomFieldEntityInfo >	Get the available Dynamic Field Entities in the system

5.1.4 GetClientSystemList

Operation	GetClientSystemList
Description	Get the available Client Systems information like the System Identifier (SID) which can be used to setup the Authentication Header information for executing the other web services' methods in the ChilliDB system. Please refer to the Authentication Information section for more details.
Parameters	<none>
Returns	Array of < ClientSystemInfo > The returned result of the ChilliDB Client System information details.

5.1.5 CheckLogin

Operation	CheckLogin
Description	Check the user login.
Parameters	String <i>strSystemIdentifier</i> The system identifier (SID) to log into. In order to get the SID, please use the web method called GetClientSystemList and retrieve the value of the System Identifier from the returned results.
	String <i>strUsername</i> The login username.
	String <i>strPassword</i>

	The login password.
Returns	Boolean The value of true will indicate that the login exist and can be used.

5.1.6 GetSystemEntities

Operation	GetSystemEntities
Description	Get the available System Entities in the system
Parameters	<none>
Returns	Array of < SystemEntityInfo > The returned result of the ChilliDB System Entity information details.

5.1.7 GetCustomFieldEntities

Operation	GetCustomFieldEntities
Description	Get the available Custom Fields Entities in the system
Parameters	<none>
Returns	Array of < CustomFieldEntityInfo > The returned result of the ChilliDB Custom Fields Entity information details.

5.2 ConfigurationManager

The Configuration Manager Web Service provides the facility to retrieve system settings data such as the database version and the system configuration setting details.

The list of Web Service methods for ConfigurationManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/ConfigurationManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The ConfigurationManager Web Service uses a web service data model called ConfigurationInfo which is described below:

5.2.1 ConfigurationInfo

The ConfigurationInfo provides the information that forms the structure of the Configuration settings item. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Configuration settings assigned by ChilliDB system	
Setting Name	String (80)	The unique key text of the Configuration Settings item. For example: DATABASE_VERSION	
Setting Name Display	String (80)	The display name of the Configuration Settings item. For example: Database Version	
Setting Value	String (1500)	The value assigned to the Configuration Settings item.	

Setting Description	String (1000)	The description of the Configuration Settings item.	
Module Identifier	Integer	The identifier of the Module which is linked to the Configuration Settings item. Every Configuration Setting item is linked to a certain module in which the setting is operating.	
Module Name	String (50)	The name of the Module which is linked to the Configuration Settings item.	
Module Description	String (255)	The description of the Module which is linked to the Configuration Settings item.	

In term of the operation support, the Configuration Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Configuration Manager Web Service

Method Signature	Return	Description
GetConfigurationSettings(String)	Array of < ConfigurationInfo >	Get the Configuration Settings of the system based on the Configuration name.

5.2.2 GetConfigurationSettings

Operation	GetConfigurationSettings
Description	Get the Configuration Settings of the system based on the Configuration name. The web method is currently only getting the database version number and date from the configuration settings.
Parameters	String <i>strConfigurationNames</i> The comma-separated Configuration Settings names belong to the

	<p>Configuration Settings item.</p> <p>If the parameter has empty value, the following names will be used to retrieve the Configuration Settings:</p> <ol style="list-style-type: none">1. DATABASE_VERSION: database version number2. DATABASE_VERSION_DATE: database version date <p>Otherwise, the service will return the values of the Configuration Setting names specified.</p> <p>More than one name can be specified by separating the names using a comma as the separator.</p> <p>For example:</p> <p>DATABASE_VERSION, DATABASE_VERSION_DATE</p>
Returns	<p>Array of <ConfigurationInfo></p> <p>The returned result of the system configuration details.</p>

5.3 UserManager

The User Manager Web Service provides the facility to retrieve User data such as the username, Contact identifier linked to the user account and the Windows user login details if the system is configured to allow login using the Windows account.

The list of Web Service methods for UserManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/UserManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The UserManager Web Service uses a number of web service data models. They are UserInfo, LicensePublicExternalInfo, and UserTicket. All of these models are described below:

5.3.1 UserInfo

The UserInfo provides the information that forms the structure of the User account. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the User account assigned by ChilliDB system	
Username	String (15)	The username of the User account	
Contact Identifier	Integer	The Contact identifier linked to the User account.	
Contact Full Name	String (255)	The Contact full name linked to the User account.	The value of the Contact full name will be the same as what is being displayed in ChilliDB
Windows Login	String (255)	The Windows login account linked to the User.	This value is defined only if the system is configured to login

			using the Windows Authentication mechanism.
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5.3.2 LicensePublicExternalInfo

The LicensePublicExternalInfo provides the information that forms the structure of the License. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Module assigned by ChilliDB system	
Module Description	String (150)	The description of the Module	
Module Is Enabled	Boolean	The status of the Module if it is enabled or disabled	

5.3.3 UserTicket

The UserTicket provides the information that forms the structure of the ChilliDB system security tickets. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Ticket assigned by ChilliDB system	
Ticket Name	String (50)	The name of the security Ticket	
Ticket Description	String (100)	The description of the security Ticket	
Module Identifier	Integer	The Module identifier linked to the Ticket.	

In term of the operation support, the User Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for User Manager Web Service

Method Signature	Return	Description
GetUsers()	Array of < UserInfo >	Get all existing Users in the system excluding the expired Users.
GetUserById(Integer)	UserInfo	Get user information by User Identifier
GetCurrentUserContactIdentifier()	Integer	Get the Contact identifier linked to the current logged in User account.
GetCurrentUserPrimaryOrganisationIdentifier()	Integer	Get the primary Organisation identifier linked to the current logged in User account.
GetModuleDetails(String)	Array of < LicensePublicExternalInfo >	Get a list of Modules available in the system using the Client' system identifier (SID).
GetSecurityTicket(String)		Get the security tickets associated with the User account.

5.3.4 GetUsers

Operation	GetUsers
Description	Get all existing Users in the system excluding the expired Users.
Parameters	<none>
Returns	Array of < UserInfo > The returned result of the User information details.

5.3.5 GetUserById

Operation	GetUserById
Description	Get user information by User Identifier
Parameters	Integer

	The User's unique identifier
Returns	UserInfo The user details for the unique identifier provided.

5.3.6 GetCurrentUserContactIdentifier

Operation	GetCurrentUserContactIdentifier
Description	Get the Contact identifier linked to the current logged in User account.
Parameters	<none>
Returns	Integer The Contact identifier linked to the User account.

5.3.7 GetCurrentUserPrimaryOrganisationIdentifier

Operation	GetCurrentUserPrimaryOrganisationIdentifier
Description	Get the primary Organisation identifier linked to the current logged in User account.
Parameters	<none>
Returns	Integer The primary Organisation identifier linked to the User account.

5.3.8 GetModuleDetails

Operation	GetModuleDetails
Description	Get a list of Modules available in the system using the Client' system identifier (SID).
Parameters	String <i>strClientSystemIdentifier</i> The System Identifier (SID) that is linked to a ChilliDB system. In order to get the SID, please use the web method called GetClientSystemList from the SystemCore web service and then retrieve the value of the System Identifier from the returned results.
Returns	Array of < LicensePublicExternalInfo > The returned result of the module information details.

5.3.9 GetSecurityTicket

Operation	GetSecurityTicket
Description	Get the security tickets associated with the User account.
Parameters	<p>String <i>strUsername</i></p> <p>The username of the User account.</p> <p>In order to get a list of available User accounts, please use web method GetUsers.</p>
Returns	<p>Array of <UserTicket></p> <p>The returned result of the User Ticket details.</p>

5.4 OrganisationManager

The Organisation Manager Web Service provides the facility to retrieve Organisation data including the Mail/Physical Addresses, Phone Numbers, Fax Numbers, Email Addresses, and also Custom Fields values.

The list of Web Service methods for OrganisationManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/OrganisationManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The OrganisationManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has two data models that are mainly used within its domain. These data models are described below:

5.4.1 OrganisationItem

The OrganisationItem provides the information that forms the structure of the Organisation record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Organisation assigned by ChilliDB system	The value is mandatory when the OrganisationItem is used in the update method.
Type	ReferenceDataItem	Represents the Organisation Type information	The value is mandatory.
Category	ReferenceDataItem	Represents the Organisation Category information	
Sub Category	ReferenceDataItem	Represents the Organisation Sub Category information	

Name	String (255)	The Organisation Name	The value is mandatory.
Abbreviation	String (20)	The abbreviated name of the Organisation	
Display Name	String	The name of the Organisation combined with the abbreviated name showed in brackets	When performing an insert/update, this value is not required.
Web Address	String (200)	The Organisation Web Address	
Business Number	String (20)	The Organisation Business Number (example in Australia is ABN)	
Business Email	String (100)	The Organisation Business Email Address	When performing an insert/update, this value is not required. In order to store an email against the Organisation, use the SaveCommunication web method.
Business Mobile	String (100)	The Organisation Business Mobile Number	When performing an insert/update, this value is not required. In order to store an mobile number against the Organisation, use the SaveCommunication web method.
Business Phone	String (100)	The Organisation Business Phone Number	When performing an insert/update, this value is not required. In order to store an phone number against the Organisation, use the SaveCommunication web method.
Personal Email	String (100)	The Organisation	When performing an insert/update, this

		Personal Email Address	value is not required. In order to store an email against the Organisation, use the SaveCommunication web method.
Personal Mobile	String (100)	The Organisation Personal Mobile Number	When performing an insert/update, this value is not required. In order to store a mobile number against the Organisation, use the SaveCommunication web method.
Personal Phone	String (100)	The Organisation Personal Phone Number	When performing an insert/update, this value is not required. In order to store a phone number against the Organisation, use the SaveCommunication web method.
Personal Fax	String (100)	The Organisation Personal Fax Number	When performing an insert/update, this value is not required. In order to store a fax number against the Organisation, use the SaveCommunication web method.
Description	String	The description of the Organisation	
Status	Char	The status of the Organisation	The value can be <i>A</i> (Active) or <i>I</i> (Inactive)
External Id	Array of < String >	The external identifier assigned temporarily by Polymorphic Solutions when performing data migration to ChilliDB	
Created By User	Integer	The system user	The value is

Id		identifier indicating the creator of the record	mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	When performing an insert/update, this value is not required.
Address Details	Array of < AddressInfo >	A collection of addresses defined for the Organisation	
Primary Contact Identifier	Integer	The identifier of the Organisation's Primary Contact	
Primary Contact	String	The name of the Organisation's Primary Contact	
Related Organisations	Array of < RelatedOrganisationItem >	The details of the organisations related to the Organisation	

5.4.2 OrganisationAddressInfo

The OrganisationAddressInfo provides the information that forms the structure of the Organisation Address record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Organisation Identifier	Integer	The Organisation identifier	The value is mandatory
Organisation Name	String (255)	The Organisation name	
Organisation Display Name	String	The Organisation full name	
Addresses	Array of AddressInfo	The collection of Address information.	The value is mandatory

5.4.3 RelatedOrganisationItem

The RelatedOrganisationItem provides the information that forms the structure of the Related Organisation record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Organisation Identifier	Integer	The Organisation identifier	The value is mandatory
Organisation Name	String (255)	The Organisation name	
Organisation Primary Organisation	String	The Organisation's Primary Organisation	
Organisation Relationship Id	Array of AddressInfo	The unique identifier or the Organisations' relationships	The value is mandatory

In addition to the OrganisationItem and OrganisationAddressInfo, the OrganisationManager also utilises other data models within the OrganisationManager web service domain such as ContactOrganisationResult, DynamicDataSection and CommunicationInfo. In order to see the definition of those data models, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Organisation Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Organisation Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Organisation Type.
GetCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Organisation Category.
GetSubCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Organisation Sub Category.
GetOrganisation (Integer)	OrganisationItem	Get the Organisation information such as the Organisation name, abbreviation, web address, business number and active status.
InsertOrganisation (OrganisationItem)	Integer	Save the Organisation information.
UpdateOrganisation (OrganisationItem)	Integer	Update the Organisation information.
SearchOrganisations (Array of < String >, ExpireStatus)	OrganisationItem	Get one or more Organisation records based on a set of filters applied to the Organisation names and/or expiry status.
SearchOrganisationsByNames (Array of < String >, String , String , ExpireStatus)	ContactOrganisationResult	Get one or more Organisation records (including Contact association

		details) based on a set of filters applied to the Organisation name, abbreviation and expiry status. The Organisation name filters consist of the general keywords and the Organisation part names (Organisation name and abbreviation)
SearchOrganisationsByPartNames(String, String)	ContactOrganisationResult	Get one or more Organisation records (including Contact association details) based on a set of filters applied to the Organisation name, abbreviation and expiry status
SearchOrganisationsByKeywords(Array of <String>, ExpireStatus)	ContactOrganisationResult	Get one or more Organisation records (including Contact association details) based on a set of filters applied to the Organisation names and expiry status
GetNumberOfOrganisations(Array of <String>, ExpireStatus)	Integer	Get the number of Organisation records based on a set of filters applied to the Organisation names and expiry status
GetCommunications(Integer)	CommunicationInfo	Get one or more

		Organisation communication records
SaveCommunication(Integer, CommunicationInfo, Boolean)	Integer	Save the Organisation communication record
DeleteCommunication(Integer, Integer)		Remove the Organisation communication record
SaveAddress(Integer, AddressInfo)	Integer	Save the Organisation address information
GetDynamicDataByOrganisation(Integer)	Array of < DynamicDataSection >	Get all Custom Fields fields and values linked to an Organisation item (Retrieved by Organisation Identifier)
GetBaseAndDynamicDataByOrganisation(Integer)	Array of < DynamicDataSection >	Get all Custom and Base Fields fields and values linked to an Organisation item (Retrieved by Organisation Identifier). Base Fields are those defined by ChilliDB System. i.e. Organisation Name, ABN, Abbreviation
GetDynamicDataByType(Integer)	Array of < DynamicDataSection >	Get all Custom Fields fields and values linked to an Organisation item (Retrieved by Organisation Type Identifier)
GetOrganisationAddresses	Array of < OrganisationAddressInfo >	Get all Organisation

		Address items
GetOrganisationAddressesByAddressType(Integer)	Array of <OrganisationAddressInfo>	Get all Organisation Address items based on Address Type
GetOrganisationAddressesByOrganisation(Integer)	Array of <AddressInfo>	Get all Organisation Address items based on Organisation Identifier
GetDynamicDataFields(Integer)	Array of <DynamicDataField>	Get all Custom Fields fields record (Retrieved by Dynamic Field Type)
GetBaseAndDynamicDataFields(Integer)	Array of <DynamicDataField>	Get all Custom and Base Fields fields record (Retrieved by Dynamic Field Type). Base Fields are those defined by ChilliDB System. i.e. Organisation Name, ABN, Abbreviation
GetDynamicDataSections(Integer)	Array of <DynamicDataSection>	Get all Custom Fields section records (Retrieved by Dynamic Field Type Identifier)
SearchOrganisationByDynamicDataField(Integer, String)	Array of <Integer>	Get all organisation items (Retrieved by Dynamic Field)
SaveDynamicDataByOrganisation(Integer, Array of <DynamicDataField>)	Boolean	Save dynamic field values for an Organisation item
RemoveDynamicDataByOrganisation(Integer, Array of <Integer>)	Boolean	Delete dynamic field values for an Organisation item

GetOrganisationsByContactEmail(String)	OrganisationItem	Get Organisation records based on contact's email address.
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5.4.4 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Organisation Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Organisation Type. Please see the Web Service Data Model section for further information.

5.4.5 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Organisation Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Organisation Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Organisation Category. Please see the Web Service Data Model section for further information.

5.4.6 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Organisation Sub Category.
Parameters	Integer <i>CategoryIdentifier</i> The Category identifier which is used to filter the Organisation Category items which has the specified Category identifier as the parent identifier.

	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Organisation Sub Category. Please see the Web Service Data Model section for further information.

5.4.7 GetOrganisation

Operation	GetOrganisation
Description	Get the Organisation information such as the Organisation name, abbreviation, web address, business number and active status.
Parameters	Integer <i>intOrganisationIdentifier</i> The unique system identifier assigned to the Organisation record. The number must exist in the ChilliDB system.
Returns	OrganisationItem The returned result of the Organisation information

5.4.8 InsertOrganisation

Operation	InsertOrganisation
Description	Save the Organisation information
Parameters	OrganisationItem <i>objOrganisation</i> The Organisation information to be saved into the system.
Returns	Integer The system identifier allocated to the new Organisation record.

5.4.9 UpdateOrganisation

Operation	UpdateOrganisation
Description	Update the Organisation information
Parameters	OrganisationItem <i>objOrganisation</i> The Organisation information to be updated.
Returns	Integer

	The system identifier associated to the updated Organisation record.
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5.4.10 SearchOrganisations

Operation	SearchOrganisations
Description	Get one or more Organisation records based on a set of filters applied to the Organisation names and expiry status
Parameters	Array of String <i>aryNameKeyword</i> The name keyword to be searched
	ExpireStatus <i>enuExpireStatus</i> The expiry status of the Organisation record
Returns	Array of OrganisationItem The returned result of the Organisation information

5.4.11 SearchOrganisationsByNames

Operation	SearchOrganisationsByNames
Description	Get one or more Organisation records (including Contact association details) based on a set of filters applied to the Organisation name, abbreviation and expiry status. The Organisation name filters consist of the general keywords and the Organisation part names (Organisation name and abbreviation)
Parameters	Array of String <i>aryNameKeyword</i> The name keyword to be searched
	String <i>strName</i> The name of the Organisation
	String <i>strAbbreviation</i> The abbreviated name of the Organisation
	ExpireStatus <i>enuExpireStatus</i> The expiry status of the Organisation record
Returns	Array of ContactOrganisationResult The returned result of the Contact and Organisation association details.

5.4.12 SearchOrganisationsByPartNames

Operation	SearchOrganisationsByPartNames
Description	Get one or more Organisation records (including Contact association details) based on a set of filters applied to the Organisation name, abbreviation and expiry status
Parameters	String <i>strName</i> The name of the Organisation
	String <i>strAbbreviation</i> The abbreviated name of the Organisation
	ExpireStatus <i>enuExpireStatus</i> The expiry status of the Organisation record
Returns	Array of ContactOrganisationResult The returned result of the Contact and Organisation association details.

5.4.13 SearchOrganisationsByKeywords

Operation	SearchOrganisationsByKeywords
Description	Get one or more Organisation records (including Contact association details) based on a set of filters applied to the Organisation names and expiry status
Parameters	Array of String <i>aryNameKeyword</i> The name keyword to be searched
	ExpireStatus <i>enuExpireStatus</i> The expiry status of the Organisation record
Returns	Array of ContactOrganisationResult The returned result of the Contact and Organisation association details.

5.4.14 GetNumberOfOrganisations

Operation	GetNumberOfOrganisations
Description	Get the number of Organisation records based on a set of filters applied to the Organisation names and expiry status
Parameters	Array of String <i>aryNameKeyword</i> The name keyword to be searched

	ExpireStatus <i>enuExpireStatus</i> The expiry status of the Organisation record
Returns	Integer The returned result of the number of Organisation records.

5.4.15 GetCommunications

Operation	GetCommunications
Description	Get one or more Organisation communication records
Parameters	Integer <i>intOrganisationId</i> The Organisation identifier
Returns	Array of < CommunicationInfo > The returned result of the Communication item information.

5.4.16 SaveCommunication

Operation	SaveCommunication
Description	Save the Organisation communication record
Parameters	Integer <i>intOrganisationId</i> The Organisation identifier
	CommunicationInfo <i>objCommunication</i> The communication information to be saved
	Boolean <i>blnIsPreferred</i> The flag option to indicate if the Communication is available to be selected into Distribution List.
Returns	Integer The system identifier allocated to the updated Communication item.

5.4.17 DeleteCommunication

Operation	DeleteCommunication
Description	Remove the Organisation communication record

Parameters	Integer <i>intOrganisationId</i> The Organisation identifier
	Integer <i>intCommunicationId</i> The Communication item identifier
Returns	<none>

5.4.18 SaveAddress

Operation	SaveAddress
Description	Save the Organisation address information
Parameters	Integer <i>intOrganisationId</i> The Organisation identifier
	AddressInfo <i>objAddress</i> The Organisation address information.
Returns	Integer The system identifier associated to the inserted/updated Address record.

5.4.19 GetDynamicDataByOrganisation

Operation	GetDynamicDataByOrganisation
Description	Get all Custom Fields fields and values linked to an Organisation item (Retrieved by Organisation Identifier)
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.4.20 GetBaseAndDynamicDataByOrganisation

Operation	GetBaseAndDynamicDataByOrganisation
Description	Get all Base and Custom Fields fields and values linked to an Organisation item (Retrieved by Organisation Identifier). Base Fields are those built in Organisation fields in ChilliDB i.e Organisation

	Name, Description, ABN, Abbreviation, Web Address
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier
Returns	Array of < DynamicDataSection > The returned result of the Base and Custom Fields Section information

5.4.21 GetDynamicDataByType

Operation	GetDynamicDataByType
Description	Get all Custom Fields fields and values linked to an Organisation item (Retrieved by Organisation Type Identifier)
Parameters	Integer <i>OrganisationTypeIdentifier</i> The Organisation identifier
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.4.22 GetOrganisationAddresses

Operation	GetOrganisationAddresses
Description	Get all Organisation Address items
Parameters	<none>
Returns	Array of < OrganisationAddressInfo > The returned result of the Organisation Address information.

5.4.23 GetOrganisationAddressesByAddressType

Operation	GetOrganisationAddressesByAddressType
Description	Get all Organisation Address items based on Address Type
Parameters	Integer <i>AddressTypeIdentifier</i> The Address Type identifier. In order to retrieve the full set of the Address Type identifiers. Please see the GetAddressTypes() web method under the ContactManager web service section.

Returns	Array of <OrganisationAddressInfo> The returned result of the Organisation Address information.
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5.4.24 GetOrganisationAddressesByOrganisation

Operation	GetOrganisationAddressesByOrganisation
Description	Get all Organisation Address items based on Organisation Identifier
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier
Returns	Array of <AddressInfo> The returned result of the Organisation Address information.

5.4.25 GetDynamicDataFields

Operation	GetDynamicDataFields
Description	Get all Custom Fields fields record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of <DynamicDataField> The returned result of the Custom Fields field section.

5.4.26 GetBaseAndDynamicDataFields

Operation	GetBaseAndDynamicDataFields
Description	Get all Base and Custom Fields fields record (Retrieved by Dynamic Field Data Type) Base Fields are those built in Organisation fields in ChilliDB i.e Organisation Name, Description, ABN, Abbreviation, Web Address
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of <DynamicDataField> The returned result of the Custom Fields field section.

5.4.27 GetDynamicDataSections

Operation	GetDynamicDataSections
Description	Get all Custom Fields section record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.4.28 SearchOrganisationByDynamicDataField

Operation	SearchOrganisationByDynamicDataField
Description	Get all organisation items (Retrieved by Dynamic Field data and values)
Parameters	Integer <i>fieldId</i> The identifier of the dynamic field data type. String <i>searchValue</i> The value of the dynamic field data
Returns	Array of < Integer > The contact items' identifiers with dynamic field values that matched the search criteria.

5.4.29 SaveDynamicDataByOrganisation

Operation	SaveDynamicDataByOrganisation
Description	Save dynamic field values for an Organisation item
Parameters	Integer <i>OrganisationIdentifier</i> The identifier of the contact item. Array of < DynamicDataField > <i>DynamicDataFieldValues</i> A collection of dynamic Custom Fields fields and values
Returns	Boolean A value of <i>true</i> means the Custom Fields values were successfully saved for an organisation item; otherwise, <i>false</i>

5.4.30 RemoveDynamicDataByOrganisation

Operation	RemoveDynamicDataByOrganisation
Description	Delete dynamic field values for an Organisation item
Parameters	<p>Integer <i>OrganisationIdentifier</i></p> <p>The identifier of the contact item.</p> <p>Array of Integer <i>DynamicFieldIdentifiers</i></p> <p>A collection of Custom Fields fields' unique identifiers.</p>
Returns	<p>Boolean</p> <p>A value of <i>true</i> means the Custom Fields values were successfully removed for an organisation item; otherwise, <i>false</i></p>

5.4.31 GetOrganisationsByContactEmail

Operation	GetOrganisationsByContactEmail
Description	Get Organisation records based on contact's email address.
Parameters	<p>String <i>ContactEmailAddress</i></p> <p>The contact's email address.</p>
Returns	<p>Array of OrganisationItem</p> <p>The Organisation details that matched the search criteria.</p>

5.5 ContactManager

The Contact Manager Web Service provides the facility to retrieve Contact data including the Mail/Physical Addresses, Phone Numbers, Fax Numbers, Email Addresses, and also Custom Fields values.

The list of Web Service methods for ContactManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/ContactManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The ContactManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the ContactInfo.

5.5.1 ContactInfo

The ContactInfo provides the information that forms the structure of the Contact record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Contact assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Contact Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Contact Category information	
Sub Category	ReferenceDataItem	Represents the Contact Sub Category information	
Name Title	ReferenceDataItem	Represents the Contact Name Title information	
Forename	String (25)	The Contact forename	The value is mandatory
Middle Name	String (25)	The Contact middle name	

Surname	String (50)	The Contact surname	The value is mandatory
Preferred Name	String (100)	The Contact preferred name	
Contact Display Name	String	The Contact full name including the name title. E.g. Mr Joe William Bloggs	When performing an insert/update, this value is not required
Department	String (50)	The Contact department	
Division	String (50)	The Contact division	
Job Title	String (100)	The Contact job title	
Gender	Char	The Contact gender	The value can be <i>M</i> (Male) or <i>F</i> (Female)
Gender Description	String	The Contact gender description	When performing an insert/update, this value is not required
Gender Value	String	The Contact gender description	When performing an insert/update, this value is not required
Status	Char	The Contact status	This field is reserved for future use and will always be empty.
Date of Birth	DateTime	The Contact date of birth	
Preferred Mailing Address	ReferenceDataIdentifier	The Contact preferred mailing address type	
External Id	Array of Integer >	The external identifier assigned temporarily by Polymorphic Solutions when performing data migration to ChilliDB	
Business Email	String (100)	The Contact business email address	When performing an insert/update, this value is not required. In order to store an email address against the Contact, use the SaveCommunication web method.
Business Phone	String (100)	The Contact business	When performing an

		phone number	insert/update, this value is not required. In order to store a phone number against the Contact, use the SaveCommunication web method.
Business Mobile	String (100)	The Contact business mobile number	When performing an insert/update, this value is not required. In order to store a mobile phone number against the Contact, use the SaveCommunication web method.
Business Fax	String (100)	The Contact business fax number	When performing an insert/update, this value is not required. In order to store an fax number against the Contact, use the SaveCommunication web method.
Personal Email	String (100)	The Contact personal email address	When performing an insert/update, this value is not required. In order to store an email address against the Contact, use the SaveCommunication web method.
Personal Phone	String (100)	The Contact personal phone number	When performing an insert/update, this value is not required. In order to store a phone number against the Contact, use the SaveCommunication web method.
Personal Mobile	String (100)	The Contact personal mobile number	When performing an insert/update, this value is not required. In order to store a

			mobile phone number against the Contact, use the SaveCommunication web method.
Personal Fax	String (100)	The Contact personal fax number	When performing an insert/update, this value is not required. In order to store an fax number against the Contact, use the SaveCommunication web method.
Organisations	Array of <OrganisationItem>	One or more Organisations which are linked to the Contact.	The value is mandatory. The Contact must be associated with at least one Organisation which is set as the Primary Organisation.
Primary Organisation	OrganisationItem	The details of the Contact's primary Organisation	
Alternate Contact Identifier	Integer	The unique identifier of the Alternate Contact selected for the contact	
Business Address	String	The Contact's preferred Mailing Address	
Address Details	Array of <AddressInfo>	One or more Contact Addresses including inherited Business Physical and Mail Address	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User	Integer	The system user identifier	

Id		indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	When performing an insert/update, this value is not required.

5.5.2 ContactAddressInfo

The ContactAddressInfo provides the information that forms the structure of the Contact Address record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Contact Identifier	Integer	The Contact identifier	The value is mandatory
Contact Forename	String (25)	The Contact forename	When performing an insert/update, this value is not required
Contact Middle Name	String (25)	The Contact middle name	When performing an insert/update, this value is not required
Contact Surname	String (50)	The Contact surname	When performing an insert/update, this value is not required
Contact Preferred Name	String (100)	The Contact preferred name	When performing an insert/update, this value is not required
Contact Display Name	String	The Contact display name	When performing an insert/update, this value is not required
Addresses	Array of AddressInfo	The collection of Address information.	The value is mandatory

5.5.3 PreferredCommunicationInfo

The PreferredCommunicationInfo provides the information that forms the structure of the Contact's preferred communication details. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Phone Id	Integer	The Communication item identifier for Phone	
Phone	String (100)	The Phone number details	
Fax Id	Integer	The Communication item identifier for Fax	
Fax	String (100)	The Fax number details	
Mobile Id	Integer	The Communication item identifier for Mobile Phone	
Mobile	String (100)	The Mobile number details	
Email Id	Integer	The Communication item identifier for Email	
Email	String (100)	The Email address details	
Organisation Id	Integer	The Communication item identifier for Contact's Organisation	
Email	String (255)	The name of the Contact's Organisation	

5.5.4 ContactRoleInfo

The ContactRoleInfo provides the information that forms the structure of the Contact's role details. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Contact Identifier	Integer	The Contact Identifier	
Organisation Identifier	Integer	The Organisation Identifier	
Hours	Decimal	The number of hours the contact was assigned to	

		the organisation	
Start	Date	The start date the contact was assigned to the organisation	
End	Date	The end date the contact was assigned to the organisation	
Expired	Date	The date the contact's role to organisation was expired	
External Id	Integer	The External Id of the Contact and Organisation role association	

In addition to the ContactInfo, ContactAddressInfo, PreferredCommunicationInfo and the ContactRoleInfo, the ContactManager also utilises other web service data models such as ContactOrganisationResult, DynamicDataSection, AddressInfo and CommunicationInfo within the ContactManager web service domain. In order to see the definition of those data models, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Contact Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Contact Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Contact Type.
GetCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Contact Category.
GetSubCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Contact Sub Category.
GetContactNameTitles (Boolean)	Array of < ReferenceDataItem >	Get the reference data items about the Contact Name Title.
GetAddressTypes ()	Array of < ReferenceDataItem >	Get the reference data items about the Contact Address Type
GetAddressStates ()	Array of < ReferenceDataItem >	Get the reference data items about the Contact Address State

GetAddressCountries()	Array of < ReferenceDataItem >	Get the reference data items about the Contact Address Country
GetContact(Integer)	ContactInfo	Get information about one Contact such as the Contact names, name title, department, division, job title, gender, status, and date of birth
SearchContacts (Array of < String >, ExpireStatus)	Array of < ContactInfo >	Get one or more Contact records based on a set of filters applied to the Contacts name and expiry status
SearchContactsByKeywords (Array of < String >, ExpireStatus)	Array of < ContactOrganisationResult >	Get one or more Contact records (including Organisation association details) based on a set of filters applied to the Contact name and expiry status
GetNumberOfContacts (Array of < String >, ExpireStatus)	Integer	Get the number of Contact records based on a set of filters applied to the Contact name and expiry status
SearchContactsByPartNames (String , String , String , String , ExpireStatus)	Array of < ContactOrganisationResult >	Get one or more Contact records (including Organisation association details) based on several Contacts part names and expiry status
SearchContactsByNames (Array of < String >, String , String , String , ExpireStatus)	Array of < ContactOrganisationResult >	Get one or more Contact records (including Organisation association details) based on a set of filters applied to the Contacts name and expiry status. The Contacts name filters consist of the general keywords and the Contact part names (first name, middle name, surname, and preferred name)
InsertContact (ContactInfo , Integer)	Integer	Save the new Contact information
UpdateContact (ContactInfo)	Integer	Save the existing Contact information
ExpireContact (Integer)		Make an existing Contact expired

UnexpireContact(Integer)		Make an existing Contact un-expired
SaveAddress(Integer, AddressInfo)	Integer	Save the Contact address information
GetAddresses(Integer)	Array of AddressInfo	Get one or more Contact address information
DeleteAddress(Integer, Integer)		Remove a specified address from a Contact
SaveCommunication(Integer, CommunicationInfo, Boolean)	Integer	Save the Contact communication record
GetCommunications(Integer)	Array of CommunicationInfo	Get one or more Contact communication records based on Contact unique identifier
DeleteCommunication(Integer, Integer)		Remove a specified communication record from a Contact
GetContactsModifiedLastMinuteValue(Integer)	Array of ContactInfo	Get one or more Contact records which have been modified for the last n minutes
GetPreferredAddressByContactIdentifier(Integer, Integer)	AddressInfo	Get the Contact preferred address based on Contact identifier
GetPreferredCommunicationByContactIdentifier(Integer, Integer)	PreferredCommunicationInfo	Get the Contact preferred communication based on Contact identifier
SearchUsersContacts(String, ExpireStatus)	Array of ContactOrganisationResult	Get Contact records (including Organisation association details) for ChilliDB Users
GetDynamicDataByContact(Integer)	Array of DynamicDataSection	Get all Custom Fields fields and values linked to a Contact item (Retrieved by Contact Identifier)
GetBaseAndDynamicDataByContact(Integer)	Array of DynamicDataSection	Get all Base and Custom Fields fields and values linked to a Contact item (Retrieved by Contact Identifier). Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender
GetDynamicDataByType	Array of	Get all Custom Fields fields and

(Integer)	<DynamicDataSection>	values linked to a Contact item (Retrieved by Contact Type Identifier)
GetBaseAndDynamicDataByType (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to a Contact item (Retrieved by Contact Type Identifier) Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender
GetContactAddresses	Array of <ContactAddressInfo>	Get all Contact Address items
GetContactAddressesByAddressType(Integer)	Array of <ContactAddressInfo>	Get all Contact Address items based on Address Type
GetContactAddressesByContact(Integer)	Array of <AddressInfo>	Get all Contact Address items based on Contact Identifier
GetContactPreferredAddresses (Boolean)	Array of <ContactAddressInfo>	Get all Contact Preferred Address items
GetContactPreferredAddressesByAddressType (Integer, Boolean)	Array of <ContactAddressInfo>	Get all Contact Preferred Address items based on Address Type
GetContactPreferredAddressesByContact (Integer, Boolean)	AddressInfo	Get all Contact Preferred Address items based on Contact Identifier
GetDynamicDataFields(Integer)	Array of <DynamicDataField>	Get all Custom Fields fields record (Retrieved by Dynamic Field Data Type)
GetBaseAndDynamicDataFields(Integer)	Array of <DynamicDataField>	Get all Base and Custom Fields fields record (Retrieved by Dynamic Field Data Type) Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender
GetBaseAndDynamicDataSections (Integer)	Array of <DynamicDataSection>	Get all Custom Fields section records (Retrieved by Dynamic Field Type Identifier)
SearchContactByDynamicDataField(Integer, String)	Array of <Integer>	Get all contact items (Retrieved by Dynamic Field data and values)

SaveDynamicDataByContact(Integer, Array of <DynamicDataField>)	Boolean	Save dynamic field values for a Contact item
RemoveDynamicDataByContact(Integer, Array of <Integer>)	Boolean	Delete dynamic field values for a Contact item
SaveOrganisationAssociation(Integer, Integer, Boolean)		Create new association between contact and organisation
GetContactsByType(Integer)	Array of < ContactInfo >	Get all contact items (Retrieved by Contact Type)
SearchContactsByEmailKeyword(String, Integer, ExpireStatus, Boolean)	Array of < ContactInfo >	Get all contact items (Retrieved by Email Keyword)

5.5.5 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Contact Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Contact Type. Please see the Web Service Data Model section for further information.

5.5.6 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Contact Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Contact Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Contact Category. Please see the Web Service Data Model section for further information.

5.5.7 GetSubCategories

Operation	GetCategories
Description	Get the reference data items about the Contact Sub Category.
Parameters	<p>Integer <i>CategoryIdentifier</i></p> <p>The Category identifier which is used to filter the Contact Category items which has the specified Category identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Contact Sub Category. Please see the Web Service Data Model section for further information.</p>

5.5.8 GetContactNameTitles

Operation	GetContactNameTitles
Description	Get the reference data items about the Contact Name Title
Parameters	<p>Boolean <i>blnInUseOnly</i></p> <p>The option to filter the returned name titles if they are or are not used by the Contact records.</p> <p>If the value is set to <i>true</i> then the returned values will only contain any name titles which have been used by the Contact records.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Contact Name Title. Please see the Web Service Data Model section for further information.</p>

5.5.9 GetAddressTypes

Operation	GetAddressTypes
Description	Get the reference data items about the Contact Address Type
Parameters	<none>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Contact Address Type. Please see the Web Service Data Model section for further information.</p>

5.5.10 GetAddressStates

Operation	GetAddressStates
Description	Get the reference data items about the Contact Address State
Parameters	<none>
Returns	Array of < ReferenceDataItem > The reference data items for Contact Address State. Please see the Web Service Data Model section for further information.

5.5.11 GetAddressCountries

Operation	GetAddressCountries
Description	Get the reference data items about the Contact Address Country
Parameters	<none>
Returns	Array of < ReferenceDataItem > The reference data items for Contact Address Country. Please see the Web Service Data Model section for further information.

5.5.12 GetContact

Operation	GetContact
Description	Get information about one Contact such as the Contact names, name title, department, division, job title, gender, status, and date of birth
Parameters	Integer <i>intContactIdentifier</i> The Contact Identifier
Returns	ContactInfo The returned result of the Contact information details.

5.5.13 SearchContacts

Operation	SearchContacts
Description	Get one or more Contact records based on a set of filters applied to the Contacts name and expiry status
Parameters	Array of < String > <i>aryNameKeywords</i> The name keywords to be searched.

	The system implements a restrictive search where the keywords will restrict the number of Contact records being returned by the system.
	ExpireStatus <i>enuExpiredStatus</i> The expiry status of the Contact record
Returns	Array of < ContactInfo > The returned result of the Contact information details.

5.5.14 SearchContactsByKeywords

Operation	SearchContactsByKeywords
Description	Get one or more Contact records (including Organisation association details) based on a set of filters applied to the Contact name and expiry status
Parameters	Array of < String > <i>aryNameKeywords</i> The name keywords to be searched. The system implements a restrictive search where the keywords will restrict the number of Contact records being returned by the system.
	ExpireStatus <i>enuExpired</i> The expiry status of the Contact record
Returns	Array of < ContactOrganisationResult > The returned result of the Contact and Organisation association details.

5.5.15 GetNumberOfContacts

Operation	GetNumberOfContacts
Description	Get the number of Contact records based on a set of filters applied to the Contact name and expiry status
Parameters	Array of < String > <i>aryNameKeywords</i> The name keywords to be searched. The system implements a restrictive search where the keywords will restrict the number of Contact records being returned by the system.
	ExpireStatus <i>enuExpired</i> The expiry status of the Contact record
Returns	Integer The returned result of the Contact details count.

5.5.16 SearchContactsByPartNames

Operation	SearchContactsByPartNames
Description	Get one or more Contact records (including Organisation association details) based on several Contacts part names and expiry status
Parameters	<p>String <i>strFirstname</i> The Contact Forename</p> <p>String <i>strMiddleName</i> The Contact Middle Name</p> <p>String <i>strSurname</i> The Contact Surname</p> <p>String <i>strPreferredName</i> The Contact Preferred Name</p> <p>ExpireStatus <i>enuExpired</i> The expiry status of the Contact record</p>
Returns	<p>Array of <ContactOrganisationResult></p> <p>The returned result of the Contact and Organisation association details.</p>

5.5.17 SearchContactsByNames

Operation	SearchContactsByPartNames
Description	Get one or more Contact records (including Organisation association details) based on a set of filters applied to the Contacts name and expiry status. The Contacts name filters consist of the general keywords and the Contact part names (first name, middle name, surname, and preferred name)
Parameters	<p>Array of <String> <i>aryNameKeywords</i> The name keywords to be searched.</p> <p>The system implements a restrictive search where the keywords will restrict the number of Contact records being returned by the system.</p> <p>String <i>strFirstname</i> The Contact Forename</p> <p>String <i>strMiddleName</i> The Contact Middle Name</p> <p>String <i>strSurname</i></p>

	The Contact Surname
	String <i>strPreferredName</i> The Contact Preferred Name
	ExpireStatus <i>enuExpired</i> The expiry status of the Contact record
Returns	Array of < ContactOrganisationResult > The returned result of the Contact and Organisation association details.

5.5.18 InsertContact

Operation	InsertContact
Description	Save the new Contact information
Parameters	ContactInfo <i>objContact</i> The Contact information to be saved into the system.
	Integer <i>intOrganisationId</i> The Organisation identifier that will be assigned as the Primary Organisation for the Contact. The Organisation identifier must exist in the list of OrganisationItem contained in the ContactInfo .
Returns	Integer The system identifier allocated to the new Contact record.

5.5.19 UpdateContact

Operation	UpdateContact
Description	Update the existing Contact information
Parameters	ContactInfo <i>objContact</i>
Returns	Integer The system identifier associated to the updated Contact record.

5.5.20 ExpireContact

Operation	ExpireContact
Description	Set an existing Contact expired
Parameters	Integer <i>intContactId</i> The Contact identifier
Returns	<none>

5.5.21 UnexpireContact

Operation	UnexpireContact
Description	Set an existing Contact un-expired
Parameters	Integer <i>intContactId</i> The Contact identifier
Returns	<none>

5.5.22 SaveAddress

Operation	SaveAddress
Description	Save the Contact address information
Parameters	Integer <i>intContactId</i> The Contact identifier
	AddressInfo <i>objAddress</i> The Contact address information.
Returns	Integer The system identifier associated to the inserted/updated Address record.

5.5.23 GetAddresses

Operation	GetAddresses
Description	Get one or more Contact address information. This method has been deprecated in ChilliDB 2.7.1 release. Please use GetContactAddressesByContact instead.

Parameters	Integer <i>intContactId</i> The Contact identifier
Returns	Array of < AddressInfo > The Address items linked to the Contact.

5.5.24 DeleteAddress

Operation	DeleteAddress
Description	Remove a specified address from a Contact
Parameters	Integer <i>intContactId</i> The Contact identifier
	Integer <i>intAddressId</i> The unique identifier of the Address item belongs to a Contact. In order to retrieve the Contact address identifier, please use the GetContactAddressesByContact method and extract the identifier information from the returned address item.
Returns	<none>

5.5.25 SaveCommunication

Operation	SaveCommunication
Description	Save the Contact communication record
Parameters	Integer <i>intContactIdentifier</i> The Contact identifier
	CommunicationInfo <i>objCommunication</i> The communication information to be saved
	Boolean <i>blnIsPreferred</i> The flag option to indicate if the Communication is available to be selected into Distribution List.
Returns	Integer The system identifier allocated to the updated Communication record.

5.5.26 GetCommunications

Operation	GetCommunications
Description	Get one or more Contact communication records based on Contact unique identifier
Parameters	Integer <i>intContactIdentifier</i> The Contact identifier
Returns	Array of < CommunicationInfo > The returned result of the Communication item details.

5.5.27 DeleteCommunication

Operation	DeleteCommunication
Description	Remove a specified communication record from a Contact
Parameters	Integer <i>intContactIdentifier</i> The Contact identifier
	Integer <i>intCommunicationIdentifier</i> The Communication identifier
Returns	<none>

5.5.28 GetContactModifiedLastMinuteValue

Operation	GetContactModifiedLastMinuteValue
Description	Get one or more Contact records which have been modified for the last <i>N</i> minutes
Parameters	Integer <i>intMinutes</i> The timeframe where one or more Contact records have been modified for the last N minutes.
Returns	Array of < ContactInfo > The returned result of the Contact information details.

5.5.29 GetPreferredAddressByContactIdentifier

Operation	GetPreferredAddressByContactIdentifier
Description	<p>Get the Contact preferred address based on Contact identifier.</p> <p>The Preferred Address will be determined based on the following priority:</p> <ol style="list-style-type: none"> 1. Contact Business Mail Address 2. Contact Business Physical Address 3. Inherited Organisation Business Mail Address 4. Inherited Organisation Business Physical Address <p>If none of the above addresses exist for the Contact, then an empty address item will be returned.</p> <p>This method has been deprecated in ChilliDB 2.7.1 release. Please use GetContactPreferredAddressesByContact instead.</p>
Parameters	<p>Integer <i>intContactIdentifier</i></p> <p>The Contact identifier</p>
	<p>Integer <i>intConsiderPrivacy</i></p> <p>The flag option to filter the returned result based on Privacy settings.</p> <p>The following values can be used:</p> <ul style="list-style-type: none"> 0 – Do not consider privacy 1 – Consider privacy
Returns	<p>AddressInfo</p> <p>The preferred address belongs to the Contact.</p>

5.5.30 GetPreferredCommunicationByContactIdentifier

Operation	GetPreferredCommunicationByContactIdentifier
Description	Get the Contact preferred communication based on Contact identifier
Parameters	<p>Integer <i>intContactIdentifier</i></p> <p>The Contact identifier</p>
	<p>Integer <i>intConsiderPrivacy</i></p> <p>The flag option to filter the returned result based on Privacy settings.</p> <p>The following values can be used:</p> <ul style="list-style-type: none"> 0 – Do not consider privacy 1 – Consider privacy

Returns	PreferredCommunicationInfo The preferred communication belongs to the Contact
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5.5.31 SearchUsersContacts

Operation	SearchUsersContacts
Description	Get Contacts which are linked to ChilliDB User accounts.
Parameters	Array of String <i>aryKeywords</i> The name keywords to be searched
	ExpireStatus <i>enuExpired</i> The expiry status of the Contact record
Returns	Array of ContactOrganisationResult The returned result of the Contact and Organisation association details.

5.5.32 GetDynamicDataByContact

Operation	GetDynamicDataByContact
Description	Get all Custom Fields fields and values linked to a Contact (Retrieved by Contact Identifier)
Parameters	Integer <i>ContactIdentifier</i> The Contact identifier
Returns	Array of DynamicDataSection The returned result of the Custom Fields Section information

5.5.33 GetBaseAndDynamicDataByContact

Operation	GetBaseAndDynamicDataByContact
Description	Get all Base and Custom Fields fields and values linked to a Contact (Retrieved by Contact Identifier). Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender
Parameters	Integer <i>ContactIdentifier</i> The Contact identifier

Returns	<p>Array of <DynamicDataSection></p> <p>The returned result of the Custom Fields Section information</p>
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5.5.34 GetDynamicDataByType

Operation	GetDynamicDataByType
Description	Get all Custom Fields fields and values linked to a Contact (Retrieved by Contact Type Identifier)
Parameters	<p>Integer <i>ContactTypeIdentifier</i></p> <p>The Contact identifier</p>
Returns	<p>Array of <DynamicDataSection></p> <p>The returned result of the Custom Fields Section information</p>

5.5.35 GetBaseAndDynamicDataByType

Operation	GetBaseAndDynamicDataByType
Description	<p>Get all Base and Custom Fields fields and values linked to a Contact (Retrieved by Contact Type Identifier)</p> <p>Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender</p>
Parameters	<p>Integer <i>ContactTypeIdentifier</i></p> <p>The Contact identifier</p>
Returns	<p>Array of <DynamicDataSection></p> <p>The returned result of the Custom Fields Section information</p>

5.5.36 GetContactAddresses

Operation	GetContactAddresses
Description	<p>Get all Contact Address items.</p> <p>The Contact Address items will include the inherited Business Mail and Physical Addresses from the Primary Organisation if the Contact does not have ones.</p> <p>The Privacy Settings of "No Contact" or "No Postal Mail" set on the Contact will restrict the Contact Address from being returned.</p>
Parameters	<none>

Returns	<p>Array of <ContactAddressInfo></p> <p>The returned result of the Contact Address information.</p>
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5.5.37 GetContactAddressesByAddressType

Operation	GetContactAddressesByAddressType
Description	<p>Get all Contact Address items based on Address Type.</p> <p>The Contact Address items will include the inherited Business Mail and Physical Addresses from the Primary Organisation if the Contact does not have ones.</p> <p>The Privacy Settings of "No Contact" or "No Postal Mail" set on the Contact will restrict the Contact Address from being returned.</p>
Parameters	<p>Integer <i>AddressTypeIdentifier</i></p> <p>The identifier of the Address Type reference data.</p>
Returns	<p>Array of <ContactAddressInfo></p> <p>The returned result of the Contact Address information.</p>

5.5.38 GetContactAddressesByContact

Operation	GetContactAddressesByContact
Description	<p>Get all Contact Address items based on Contact Identifier.</p> <p>The Contact Address items will include the inherited Business Mail and Physical Addresses from the Primary Organisation if the Contact does not have ones.</p> <p>The Privacy Settings of "No Contact" or "No Postal Mail" set on the Contact will restrict the Contact Address from being returned.</p>
Parameters	<p>Integer <i>ContactIdentifier</i></p> <p>The Contact identifier</p>
Returns	<p>Array of <AddressInfo></p>

5.5.39 GetContactPreferredAddresses

Operation	GetContactPreferredAddresses
Description	<p>Get all Contact Preferred Address items.</p> <p>The Preferred Address will be determined based on the following priority:</p> <ol style="list-style-type: none"> 1. Contact Business Mail Address 2. Contact Business Physical Address 3. Inherited Organisation Business Mail Address 4. Inherited Organisation Business Physical Address <p>If none of the above addresses exist for the Contact, then an empty address item will be returned.</p>
Parameters	<p>Boolean <i>ConsiderPrivacy</i></p> <p>The flag option to indicate if the returned Address item should include Addresses with privacy setting configured.</p>
Returns	<p>Array of <ContactAddressInfo></p> <p>The returned result of the Contact Address information.</p>

5.5.40 GetContactPreferredAddressesByAddressType

Operation	GetContactPreferredAddressesByAddressType
Description	<p>Get all Contact Preferred Address items based on Address Type.</p> <p>The Preferred Address will be determined based on the following priority:</p> <ol style="list-style-type: none"> 1. Contact Business Mail Address 2. Contact Business Physical Address 3. Inherited Organisation Business Mail Address 4. Inherited Organisation Business Physical Address <p>If none of the above addresses exist for the Contact, then an empty address item will be returned.</p>
Parameters	<p>Integer <i>ContactIdentifier</i></p> <p>The Contact identifier</p>
	<p>Boolean <i>ConsiderPrivacy</i></p> <p>The flag option to indicate if the returned Address item should include Addresses with privacy setting configured.</p>
Returns	<p>Array of <ContactAddressInfo></p> <p>The returned result of the Contact Address information.</p>

5.5.41 GetContactPreferredAddressesByContact

Operation	GetContactPreferredAddressesByContact
Description	<p>Get all Contact Preferred Address items based on Contact Identifier.</p> <p>The Preferred Address will be determined based on the following priority:</p> <ol style="list-style-type: none"> 1. Contact Business Mail Address 2. Contact Business Physical Address 3. Inherited Organisation Business Mail Address 4. Inherited Organisation Business Physical Address <p>If none of the above addresses exist for the Contact, then an empty address item will be returned.</p>
Parameters	<p>Integer <i>AddressTypeIdentifier</i></p> <p>The identifier of the Address Type reference data.</p>
	<p>Boolean <i>ConsiderPrivacy</i></p> <p>The flag option to indicate if the returned Address item should include Addresses with privacy setting configured.</p>
Returns	<p>Array of <AddressInfo></p> <p>The returned result of the Contact Address information.</p>

5.5.42 GetDynamicDataFields

Operation	GetDynamicDataFields
Description	Get all Custom Fields fields record (Retrieved by Dynamic Field Data Type)
Parameters	<p>Integer <i>TypeIdentifier</i></p> <p>The identifier of the dynamic field data type.</p>
Returns	<p>Array of <DynamicDataField></p> <p>The returned result of the Custom Fields field section.</p>

5.5.43 GetBaseAndDynamicDataFields

Operation	GetBaseAndDynamicDataFields
Description	<p>Get all Base Custom Fields fields record (Retrieved by Dynamic Field Data Type)</p> <p>Base Fields are the Contact's built in Fields in ChilliDB, i.e. First Name, Last Name, Date of Birth, Gender</p>

Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataField > The returned result of the Custom Fields field section.

5.5.44 GetBaseAndDynamicDataSections

Operation	GetBaseAndDynamicDataSections
Description	Get all Base Custom Fields sections record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.5.45 SearchContactByDynamicDataField

Operation	SearchContactByDynamicDataField
Description	Get all contact items (Retrieved by Dynamic Field data and values)
Parameters	Integer <i>fieldId</i> The identifier of the dynamic field data type. String <i>searchValue</i> The value of the dynamic field data
Returns	Array of < Integer > The contact items' identifiers with dynamic field values that matched the search criteria.

5.5.46 SaveDynamicDataByContact

Operation	SaveDynamicDataByContact
Description	Save dynamic field values for a Contact item
Parameters	Integer <i>ContactIdentifier</i> The identifier of the contact item.

	<p>Array of <DynamicDataField> <i>DynamicDataFieldValues</i></p> <p>A collection of dynamic Custom Fields fields and values</p>
Returns	<p>Boolean</p> <p>A value of <i>true</i> means the Custom Fields values were successfully saved for a contact item; otherwise, <i>false</i></p>

5.5.47 RemoveDynamicDataByContact

Operation	RemoveDynamicDataByContact
Description	Delete dynamic field values for a Contact item
Parameters	<p>Integer <i>ContactIdentifier</i></p> <p>The identifier of the contact item.</p> <p>Array of <Integer> <i>DynamicFieldIdentifiers</i></p> <p>A collection of Custom Fields fields' unique identifiers.</p>
Returns	<p>Boolean</p> <p>A value of <i>true</i> means the Custom Fields values were successfully removed for a contact item; otherwise, <i>false</i></p>

5.5.48 SaveOrganisationAssociation

Operation	SaveOrganisationAssociation
Description	Save new contact and organisation association
Parameters	<p>Integer <i>ContactIdentifier</i></p> <p>The identifier of the contact item.</p> <p>Integer <i>OrganisationIdentifier</i></p> <p>The identifier of the organisation item</p> <p>Boolean <i>IsPrimaryOrganisation</i></p> <p>Determine whether the organisation will be set as primary organisation or not.</p>
Returns	<none>

5.5.49 GetContactsByType

Operation	GetContactsByType
Description	Get all contact items (Retrieved by Contact Type)
Parameters	Integer <i>contactTypeIdentifier</i> The identifier of the contact type.
Returns	Array of < ContactInfo > The returned result of the Contact information details.

5.5.50 SearchContactsByEmailKeyword

Operation	SearchContactsByEmailKeyword
Description	Get all contact items (Retrieved by Email Keyword)
Parameters	String <i>EmailKeyword</i> The email keyword to be searched. Integer <i>EmailTypeIdentifier</i> The email type identifier to be searched. ExpireStatus <i>ExpiredStatus</i> The expiry status of the Contact record Boolean <i>ExcludeContactWithPrivaryRequest</i> A true or false value to determine whether to exclude Contact with privacy request from the search or not.
Returns	Array of < ContactInfo > The returned result of the Contact information details.

5.6 NoteManager

The Note Manager Web Service provides the facility to retrieve Note data which consists of title, description, note date, followup date, and also the Contacts or Organisations that are linked to the Note.

The list of Web Service methods for NoteManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/NoteManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The NoteManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the NoteInfo.

5.6.1 NoteInfo

The NoteInfo provides the information that forms the structure of the Note record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Note assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Note Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Note Category information	
Sub Category	ReferenceDataItem	Represents the Note Sub Category information	
Title	String (255)	The Note title	The value is mandatory
Plain Text	String	The plain text format of the Note description	

Text	String	The HTML text format of the Note description	
Status	Char	The Note status. The value can be Open (O) or Closed (C)	The value is mandatory
Date	DateTime	The date set on the Note by the user	The value is mandatory
Follow Up Date	DateTime	The follow up date set on the Note by the user. If the follow up date is set, then the Note Status is set to Open otherwise it is set to Closed.	
Is Sensitive	Boolean	The status to determine if the Note record is sensitive to be viewed by certain users or roles linked to the users.	When performing an insert/update, this value is not required
Associations	Array of <NoteAssociation>	The Contact and Organisation associations with the Note record.	
Message Identifier	String (900)	The global unique identifier that distinguish different email messages.	The < and > characters need to be included when inserting/updating the email message as a Note item.
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last	When performing an insert/update, this

		modified of the record	value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	

5.6.2 NoteAssociation

The NoteAssociation provides the information that forms the structure of the associated data between Note, Contact, Organisation, and Contact Role records. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Note Association item assigned by ChilliDB system	
Contact Identifier	Integer	The identifier of the Contact	The value is mandatory
Organisation Identifier	Integer	The identifier of the Organisation	The value is mandatory
Contact Role Identifier	Integer	The identifier of the Contact Role item	
Is Primary	Boolean	The status to determine if the Organisation identified by the Organisation Identifier is the Primary Organisation of the Contact identified by the Contact Identifier.	The value is mandatory
Text	String	The text representation of the Contact and Organisation name combination.	When performing an insert/update, this value is not required
Interaction	ReferenceDataItem	Represents the Note Interaction Method information	The value is mandatory
Interaction Method	InteractionMethod	Represents the Note Interaction Method information	The value is mandatory

In term of the operation support, the Note Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Note Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Note Type.
GetCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Note Category.
GetSubCategories (Integer , SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Note Sub Category.
GetNoteInteractionMethods (Boolean , ExpireStatus)	Array of < ReferenceDataItem >	Get the reference data items about the Note interaction methods
GetNote (Integer)	NoteInfo	Get the information about a Note record such as the Note title, contents, status, and related dates by using the Note identifier.
SaveNote (NoteInfo)	Integer	Save the note information
AttachFile (Integer , String , String , Base64Binary)	<none>	Attach file into a Note record
GetNoteByMessageIdentifier (String)	NoteInfo	Get the information about a Note record such as the Note title, contents, status, and related dates by using the knowledge of email message identifier.

5.6.3 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Note Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Note Type. Please see the

[Web Service Data Model](#) section for further information.

5.6.4 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Note Category.
Parameters	<p>Integer <i>TypeIdentifier</i></p> <p>The Type identifier which is used to filter the Note Category items which has the specified Type identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Note Category. Please see the Web Service Data Model section for further information.</p>

5.6.5 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Note Sub Category.
Parameters	<p>Integer <i>CategoryIdentifier</i></p> <p>The Category identifier which is used to filter the Note Category items which has the specified Category identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Note Sub Category. Please see the Web Service Data Model section for further information.</p>

5.6.6 GetNoteInteractionMethods

Operation	GetNoteInteractionMethods
Description	Get the reference data items about the Note interaction methods
Parameters	<p>Boolean <i>blnInUseOnly</i></p> <p>The option to filter the returned the Note interaction methods if they are or</p>

	are not used by the Note records. If the value is set to <i>true</i> then the returned values will only contain any interaction methods which have been used by the Note records.
	ExpireStatus <i>enuExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Note Interaction Method. Please see the Web Service Data Model section for further information.

5.6.7 GetNote

Operation	GetNote
Description	Get the information about a Note record such as the Note title, contents, status, and related dates by using the Note identifier.
Parameters	Integer <i>intIdentifier</i> The Note identifier
Returns	NoteInfo The returned result of the Note information details.

5.6.8 SaveNote

Operation	SaveNote
Description	Save the note information
Parameters	NoteInfo <i>objNote</i> The Note information to be saved
Returns	Integer The system identifier allocated to the new Note record or associated with an existing Note record.

5.6.9 AttachFile

Operation	AttachFile
Description	Attach the file into the Note record.
Parameters	Integer <i>intIdentifier</i>

	The Note identifier
	String <i>strFileMimeType</i> The file MIME type. For examples: text/html, image/png, audio/mpeg, application/pdf, etc.
	String <i>strFileName</i> The file name
	Base64Binary <i>aryContent</i> The content of the file which is represented as byte data.
Returns	Integer The system identifier allocated to the new Note record or associated with an existing Note record.

5.6.10 GetNoteByMessageIdentifier

Operation	GetNoteByMessageIdentifier
Description	Attach the file into the Note record.
Parameters	<p>String <i>strMessageIdentifier</i></p> <p>The global unique email message identifier. The identifier is exposed through the email message header from the property called <i>Message-ID</i>. The < and > characters need to be included in the parameter.</p> <p>Examples:</p> <pre>Message-ID: <AANLyTik7yTzDRmJpCexduS3hwscgV2rK5_K1X5cTpvZT@mail.gmail.com></pre>
Returns	<p>NoteInfo</p> <p>The returned result of the Note information details.</p>

5.7 EventManager

The Event Manager Web Service provides the facility to retrieve Event data which consists of title, description, related dates, venue, organiser and other details relevant to the Event record.

The list of Web Service methods for EventManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/EventManager.aspx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The EventManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the EventInfo.

5.7.1 EventInfo

The EventInfo provides the information that forms the structure of the Event record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Event assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Event Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Event Category information	
Sub Category	ReferenceDataItem	Represents the Event Sub Category information	
Title	String (100)	The Event title	The value is mandatory
Description	String (4000)	The description of the Event	
Code	String (10)	The code of the Event	

Start Date	DateTime	The start date of the Event.	The value is mandatory
End Date	DateTime	The end date of the Event	The value is mandatory
Organiser Organisation Identifier	Integer	The Organisation identifier belongs to the Event Organiser	The value is mandatory
Organiser Organisation Name	String	The Event Organiser name	When performing an insert/update, this value is not required
Venue	String (255)	The Event venue	
Point Type	ReferenceDataItem	Represents the Event Point Type information. This field is only relevant to some Divisions who calculate points from the Event attendee for special reporting purpose.	
Total Points	Integer	The total points accumulated for the Event. This field value is only relevant to some Divisions who calculate points from the Event attendee for special reporting purpose.	
Closed Date	DateTime	The date when the Event is closed.	Setting up this field value will disable the Event in ChilliDB screen and restrict the record from any further editing.
Price	Decimal	The amount required to be paid when attending the event	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time	The value is

		saved when the record was created	mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	

In addition to the EventInfo, the EventManager also utilises DynamicDataSection as web service data model within the EventManager web service domain. In order to see the definition of the DynamicDataSection data model, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Event Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Event Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Type.
GetCategories (Integer , SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Category.
GetSubCategories (Integer , SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Sub Category.
GetPointsType (Boolean)	Array of ReferenceDataItem	Get the reference data items about the Event Point Type.
GetEvents ()	Array of EventInfo	Get all Event records showing the information about title, description, venue, organiser and other details.
GetEvent (Integer)	EventInfo	Get the information about an Event record such as the title, description, venue, organiser and other details by using the Event identifier.
SearchEvent (String , String)	Array of EventInfo	Search particular Event records

		based on the Event Title keywords and also the Event Code.
GetEventsByDates(DateTime, DateTime)	Array of <EventInfo>	Search particular Event records based on the Event's Start Date and End Date.
GetEventsByIds(String)	Array of <EventInfo>	Get Events details for the provided list of Event Identifiers
GetDynamicDataFields(Dynamic FieldDataType, MultipleSelectOption)	Array of <DynamicDataField>	Get all Custom Fields fields record (Retrieved by Dynamic Field Data Type and Selection option)
GetDynamicDataSections(Integer)	Array of <DynamicDataSection>	Get all Custom Fields section records (Retrieved by Dynamic Field Type Identifier)
SearchEventByDynamicDataField(Integer, String)	Array of <Integer>	Get all Event identifiers (Retrieved by Dynamic Field and values)
SearchEventsByDynamicDataFields(String, String, DateTime, DateTime, Array of <DynamicSearchField>)	Array of <EventInfo>	Get Events details based on Custom Fields criteria.
SaveDynamicDataByEvent(Integer, Array of <DynamicDataField>)	Boolean	Save dynamic field values for an Event item
InsertEvent(EventInfo)	Integer	Save information for the new Event
UpdateEvent(EventInfo)		Save information for an existing Event

5.7.2 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Event Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of <ReferenceDataItem> The reference data items for Event Type. Please see the

[Web Service Data Model](#) section for further information.

5.7.3 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Event Category.
Parameters	<p>Integer <i>TypeIdentifier</i></p> <p>The Type identifier which is used to filter the Event Category items which has the specified Type identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Event Category. Please see the Web Service Data Model section for further information.</p>

5.7.4 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Event Sub Category.
Parameters	<p>Integer <i>CategoryIdentifier</i></p> <p>The Category identifier which is used to filter the Event Category items which has the specified Category identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Event Sub Category. Please see the Web Service Data Model section for further information.</p>

5.7.5 GetPointTypes

Operation	GetPointTypes
Description	Get the reference data items about the Event Point Type.
Parameters	<p>Boolean <i>IsInUseOnly</i></p> <p>The option to filter the returned point types if they are or are not used by</p>

	<p>the Event records.</p> <p>If the value is set to <i>true</i> then the returned values will only contain any point types which have been used by the Event records.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Event Point Type. Please see the Web Service Data Model section for further information.</p>

5.7.6 GetEvents

Operation	GetEvents
Description	Get all Event records showing the information about title, description, venue, organiser and other details.
Parameters	<none>
Returns	<p>Array of <EventInfo></p> <p>The returned result of Event information details.</p>

5.7.7 GetEvent

Operation	GetEvent
Description	Get the information about an Event record such as the title, description, venue, organiser and other details by using the Event identifier.
Parameters	<p>Integer <i>EventIdentifier</i></p> <p>The Event identifier.</p>
Returns	<p>EventInfo</p> <p>The returned result of Event information details.</p>

5.7.8 SearchEvent

Operation	SearchEvent
Description	Search particular Event records based on the Event Title keywords and also the Event Code.
Parameters	<p>String <i>Code</i></p> <p>The Event code keyword that will be used as a filter to refine the Event search result.</p>
	String <i>EventTitle</i>

	The Event title keywords that will be used as filters to refine the Event search result.
Returns	Array of < EventInfo > The returned result of Event information details.

5.7.9 GetEventsByDates

Operation	GetEventsByDates
Description	Search particular Event records based on the Event's Start Date and End Date.
Parameters	DateTime <i>StartDate</i> The Event's start date. DateTime <i>EndDate</i> The Event's end date.
Returns	Array of < EventInfo > The returned result of Event information details.

5.7.10 GetEventsByIDs

Operation	GetEventsByIDs
Description	Get Events details for the provided list of Event Identifiers
Parameters	String <i>IDString</i> A comma-separated value (CSV) of Event Identifiers
Returns	Array of < EventInfo > The returned result of Event information details.

5.7.11 GetDynamicDataFields

Operation	GetDynamicDataFields
Description	Get all Custom Fields field records (Retrieved by Dynamic Field Data Type and Selection option)
Parameters	DynamicFieldDataType <i>DynamicDataType</i> The data type of the dynamic field. MultipleSelectOption <i>MultipleSelectOption</i>

	The type of dynamic field selection.
Returns	Array of < DynamicDataField > The returned result of the Custom Fields Field information.

5.7.12 GetDynamicDataSections

Operation	GetDynamicDataSections
Description	Get all Custom Fields section record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.7.13 SearchEventByDynamicDataField

Operation	SearchEventByDynamicDataField
Description	Get all Event identifiers (Retrieved by Dynamic Field and values)
Parameters	Integer <i>fieldId</i> The unique identifier of the Custom Fields Field. String <i>searchValue</i> A string that represents the Custom Fields Field value.
Returns	Array of < Integer > The returned result of the Event identifiers.

5.7.14 SearchEventsByDynamicDataFields

Operation	SearchEventsByDynamicDataFields
Description	Get Events details based on Custom Fields criteria.
Parameters	String <i>EventCode</i> A string that represents the code of the Event String <i>EventTitle</i> A string that represents the keyword for an Event Title. DateTime <i>EventDateRangeStart</i>

	<p>The start of the Event date range criteria. DateTime EventDateRangeEnd</p> <p>The end of the Event date range criteria. Array of <DynamicSearchField> A collection of Dynamic Search Field to be used when searching Events.</p>
Returns	<p>Array of <EventInfo> The returned result of Event information details.</p>

5.7.15 SaveDynamicDataByEvent

Operation	SaveDynamicDataByEvent
Description	Save dynamic field values for an Event item.
Parameters	<p>Integer EventIdentifier The unique identifier of the Event item.</p> <p>Array of <DynamicDataField> DynamicDataFieldValues A collection of Custom Fields fields and values to store against the Event item.</p>
Returns	<p>Boolean A value of <i>true</i> means the Custom Fields values were successfully saved for an event item; otherwise, <i>false</i></p>

5.7.16 InsertEvent

Operation	InsertEvent
Description	Save information for the new Event item.
Parameters	<p>EventInfo EventDetails The object that contains all information for the new Event item.</p>
Returns	<p>Integer The unique identifier of the new Event item.</p>

5.7.17 UpdateEvent

Operation	UpdateEvent
Description	Save information for an existing Event item.

Parameters	EventInfo <i>EventDetails</i> The object that contains all information for the existing Event item.
Returns	<none>

5.8 EventSessionManager

The Event Session Manager Web Service provides the facility to retrieve Event Session data which consists of title, description, related dates, venue and other details relevant to the Event Session record.

The list of Web Service methods for EventSessionManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/EventSessionManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The EventSessionManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the EventSessionInfo.

5.8.1 EventSessionInfo

The EventSessionInfo provides the information that forms the structure of the Event Session record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Event Session assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Event Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Event Category information	
Sub Category	ReferenceDataItem	Represents the Event Sub Category information	
Event Identifier	Integer	The unique identifier of the Event Session assigned by ChilliDB system	

Title	String (255)	The Session title	The value is mandatory
Code	String (10)	The Session code	
Venue Organisation Identifier	Integer	The identifier belongs to the Organisation being used as the venue	
Venue Organisation	String	The Event Organiser name	When performing an insert/update, this value is not required
Details	String (255)	The detailed information about the Session. This can be the description of the Session or the summary of the activities to be performed in the Session.	The value is mandatory
Contact Person Contact Identifier	Integer	The identifier belongs to the Contact who is acting as the Contact Person for the Session.	
Contact Person Contact Name	String	The Contact Person name.	When performing an insert/update, this value is not required
Start Date	DateTime	The start date and time of the Session.	The value is mandatory
End Date	DateTime	The end date and time of the Session.	The value is mandatory
Point Value	Decimal	The point of value to be gained by the Event attendee by attending the Sessions. This field is only relevant to some Divisions who calculate points from the Event attendee for special reporting purpose.	
Maximum Places	Integer	The maximum number of places allocated for the Session.	
Outlook Appointment Identifier	String (255)	The Outlook appointment's global identifier for the Session.	The value is populated when storing appointments/meetings

			from ChilliDB Outlook Plug-in.
Public View	Boolean	Determines if the Event Session is visible to Web Controls	
Price	Decimal	The amount price when attending the Event Session	
Registered Not Paid Count	Integer	Number of Event Session Attendees with Status Registered Not Paid	
Registered Count	Integer	Number of Event Session Attendees with Status Registered	
Cancelled Count	Integer	Number of Event Session Attendees with Status Cancelled	
No Show Count	Integer	Number of Event Session Attendees with Status No Show	
Attended Count	Integer	Number of Event Session Attendees with Status Attended	
Waitlist Count	Integer	Number of Event Session Attendees with Status Waitlist	
Start Date and Time	DateTime	The start date and time of the Session.	
End Date and Time	DateTime	The end date and time of the Session.	

In addition to the EventSessionInfo, the EventSessionManager also utilises DynamicDataSection as web service data model within the EventSessionManager web service domain. In order to see the definition of the DynamicDataSection data model, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Event Session Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Event Session Manager Web Service

Method Signature	Return	Description
GetTypes(SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Event Type.
GetCategories(Integer, SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Event Category.
GetSubCategories(Integer, SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Event Sub Category.
GetEventSessions()	Array of <EventSessionInfo>	Get all Event Session items showing the information about title, description, related dates, venue and other details.
GetEventSessionsByEvent(Integer)	Array of <EventSessionInfo>	Get all Event Session items linked to an Event.
GetEventSession(Integer)	EventSessionInfo	Get the information about an Event Session item such as the title, description, related dates, venue and other details by using the Event Session identifier.
GetEventSessionsByDates(Date, Date)	Array of <EventSessionInfo>	Get all the Event Session items. (Retrieved by Event Session's start and end dates)
GetPublicEventSessions()	Array of <EventSessionInfo>	Get all the public Event Session items.
GetPublicEventSessionsByEvent(Integer)	Array of <EventSessionInfo>	Get all the public Event Session items linked to an Event.
GetPublicEventSessionByDates(Date, Date)	Array of <EventSessionInfo>	Get all the public Event Session items. (Retrieved by Event Session's start and end dates)
GetEventSessionByOutlookAppointmentIdentifier(String)	EventSessionInfo	Get the Event Session item. (Retrieved by outlook appointment identifier)
GetDynamicDataByEvent(Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to an Event Session item (Retrieved by Event Identifier)
GetDynamicDataBySession(Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to an Event Session item (Retrieved by Event

		Session Identifier)
GetDynamicDataSections(Integer)	Array of <DynamicDataSection>	Get all Custom Fields section records (Retrieved by Dynamic Field Type Identifier)
SearchEventSessionByDynamicDataField(Integer, String)	Array of <Integer>	Search for all Event Session identifiers. (Retrieved by Custom Fields field and values)
InsertEventSession(EventSessionInfo)	Integer	Save the information for the new Event Session item.
UpdateSession(EventSessionInfo)		Save the information for an existing Event Session item.

5.8.2 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Event Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of <ReferenceDataItem> The reference data items for Event Type. Please see the Web Service Data Model section for further information.

5.8.3 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Event Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Event Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of <ReferenceDataItem> The reference data items for Event Category. Please see the Web Service Data Model section for further information.

5.8.4 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Event Sub Category.
Parameters	Integer <i>CategoryIdentifier</i> The Category identifier which is used to filter the Event Category items which has the specified Category identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Event Sub Category. Please see the Web Service Data Model section for further information.

5.8.5 GetEventSessions

Operation	GetEventSessions
Description	Get all Event Session items showing the information about title, description, related dates, venue and other details.
Parameters	<none>
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.6 GetEventSessionsByEvent

Operation	GetEventSessionsByEvent
Description	Get all Event Session items linked to an Event.
Parameters	Integer <i>EventIdentifier</i> The Event identifier
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.7 GetEventSession

Operation	GetEventSession
Description	Get the information about an Event Session item such as the title, description, related dates, venue and other details by using the Event Session identifier.
Parameters	Integer <i>EventSessionIdentifier</i> The Event Session identifier.
Returns	EventSessionInfo The returned result of the Event Session information details.

5.8.8 GetEventSessionsByDates

Operation	GetEventSessionsByDates
Description	Get all the Event Session items. (Retrieved by Event Session's start and end dates)
Parameters	Date <i>StartDate</i> The Event Session's start date.
	Date <i>EndDate</i> The Event Session's end date.
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.9 GetPublicEventSessions

Operation	GetPublicEventSessions
Description	Get all public Event Session items showing the information about title, description, related dates, venue and other details.
Parameters	<none>
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.10 GetPublicEventSessionsByEvent

Operation	GetPublicEventSessionsByEvent
Description	Get all public Event Session items linked to an Event.
Parameters	Integer <i>EventIdentifier</i> The Event identifier
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.11 GetPublicEventSessionsByDates

Operation	GetPublicEventSessionsByDates
Description	Get all public Event Session items. (Retrieved by Event Session's start and end dates)
Parameters	Date <i>StartDate</i> The Event Session's start date. Date <i>EndDate</i> The Event Session's end date.
Returns	Array of < EventSessionInfo > The returned result of the Event Session information details.

5.8.12 GetEventSessionByOutlookAppointmentIdentifier

Operation	GetEventSessionByOutlookAppointmentIdentifier
Description	Get the Event Session item. (Retrieved by outlook appointment identifier)
Parameters	String <i>OutlookAppointmentIdentifier</i> The outlook appointment identifier for the Event Session
Returns	EventSessionInfo The returned result of the Event Session information details.

5.8.13 GetDynamicDataByEvent

Operation	GetDynamicDataByEvent
Description	Get all Custom Fields fields and values linked to some Event Session items under an Event. (Retrieved by Event Identifier)
Parameters	Integer <i>EventIdentifier</i> The Event identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.8.14 GetDynamicDataBySession

Operation	GetDynamicDataBySession
Description	Get all Custom Fields fields and values linked to an Event Session item (Retrieved by Organisation Identifier)
Parameters	Integer <i>EventSessionIdentifier</i> The Event Session identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.8.15 GetDynamicDataSections

Operation	GetDynamicDataSections
Description	Get all Custom Fields section record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.8.16 SearchEventSessionByDynamicDataField

Operation	SearchEventSessionByDynamicDataField
Description	Search for all Event Session identifiers. (Retrieved by Custom Fields field and values)
Parameters	<p>Integer <i>fieldId</i> The Custom Fields Field identifier.</p> <p>String <i>searchValue</i> The Dyanmica Data Field value.</p>
Returns	<p>Array of <Integer></p> <p>A collection of Event Session identifiers.</p>

5.8.17 InsertEventSession

Operation	InsertEventSession
Description	Save the information for the new Event Session item.
Parameters	<p>EventSessionInfo <i>EventSessionDetails</i> The object that stores the new Event Session information.</p>
Returns	<p>Integer The unique identifier of the new Event Session.</p>

5.8.18 UpdateSession

Operation	UpdateSession
Description	Save the information for an existing Event Session item.
Parameters	<p>EventSessionInfo <i>EventSessionDetails</i> The object that stores the information for an existing Event Session.</p>
Returns	<none>

5.9 EventRegistrationManager

The Event Registration Manager Web Service provides the facility to retrieve Event Registration data which consists of references to the Event and Event Session linked to the registration, status, the Contact or Organisation linked to the registration, and the booking information details.

The list of Web Service methods for EventRegistrationManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/EventRegistrationManager.aspx

Notes:

- XYZ is the name of your Web Server which hosts ChilliDB
- ChilliDB is the name of your ChilliDB web application share on your web server.
 - Default value is ChilliDB for clients hosting their own ChilliDB.
 - Some older systems may still use DIS instead of ChilliDB
 - Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.

The EventRegistrationManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the EventRegistrationInfo.

5.9.1 EventRegistrationInfo

The EventRegistrationInfo provides the information that forms the structure of the Event Registration record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Event Registration assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Event Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Event Category information	
Sub Category	ReferenceDataItem	Represents the Event Sub Category information	
Event Session Identifier	Integer	The reference identifier to the Event Session record	

		linked to this Registration	
Event Identifier	Integer	The reference identifier to the Event record linked to this Registration	
Registration Status Identifier	Integer	<p>The identifier being used to identify the status of the Registration.</p> <p>The following status items have been introduced in ChilliDB system:</p> <p>1 – Registered – Not Paid</p> <p>2 – Registered</p> <p>3 – Cancelled</p> <p>4 – No Show</p> <p>5 – Attended</p>	The value is mandatory
Registration Status	String	The description of the Registration Status.	When performing an insert/update, this value is not required
Contact Identifier	Integer	The identifier belongs to a Contact who is registered to the Event Session.	
Contact Full Name	String	The registered Contact full name	When performing an insert/update, this value is not required
Organisation Identifier	Integer	<p>The identifier belongs to a Organisation who is registered to the Event Session.</p> <p>This field can also contain the Organisation identifier which is linked to the registered Contact.</p>	The value is mandatory
Organisation Full Name	String	The registered Organisation full name	When performing an insert/update, this value is not required
Booking Number	Integer	The registration booking number	
Booking Date	DateTime	The registration booking date	

5.9.2 EventSessionRegistrationStatus

The EventSessionRegistrationStatus provides the information that forms the structure of the Event Registration Status record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Event Registration Status	
Description	String	Represents the Event Registration Status information	
Alias	String	The alternate name provided by the client for the Event Registration Status	

In addition to the EventRegistrationInfo, the EventRegistrationManager also utilises DynamicDataSection as web service data model within the EventRegistrationManager web service domain. In order to see the definition of the DynamicDataSection data model, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Event Registration Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Event Registration Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Type.
GetCategories (Integer , SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Category.
GetSubCategories (Integer , SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the Event Sub Category.
GetEventRegistrations ()	Array of EventRegistrationInfo	Get all Event Registration items showing the information about the status, booking number, booking date and other details.
GetEventRegistrationsByEvent	Array of	Get all Event Registration items

(Integer)	<EventRegistrationInfo>	linked to an Event.
GetEventRegistrationsBySession (Integer)	Array of <EventRegistrationInfo>	Get all Event Registration items linked to an Event Session.
GetEventRegistrationsBySession AndRegistrationStatus (Integer, EventRegistrationStatus)	Array of <EventRegistrationInfo>	Get all Event Registration items linked to an Event Session by Event Registration Status.
GetEventRegistrationStatusList ()	Array of <EventSessionRegistrationStatus>	Get all Event Registration Status in the system.
GetEventRegistrationsByContact (Integer)	Array of <EventRegistrationInfo>	Get all Event Registration items linked to a Contact.
GetEventRegistrationsByOrganisation (Integer)	Array of <EventRegistrationInfo>	Get all Event Registration items linked to an Organisation.
GetEventRegistrationsByRegistrationStatus (EventRegistrationStatus)	Array of <EventRegistrationInfo>	Get all Event Registration items based on Event Registration Status.
GetEventRegistration (Integer)	EventRegistrationInfo	Get the information about an Event Registration item such as the status, booking number, booking date and other details by using the Event Session identifier.
GetDynamicDataByEvent (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to some Event Registration items under an Event (Retrieved by Event Identifier)
GetDynamicDataBySession (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to some Event Registration items under an Event Session item (Retrieved by Event Session Identifier)
GetDynamicDataByRegistration (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to an Event Registration item (Retrieved by Event Registration Identifier)
GetDynamicDataByContact (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to some Event Registration items linked to a Contact record (Retrieved by Contact Identifier)

GetDynamicDataByOrganisation (Integer)	Array of <DynamicDataSection>	Get all Custom Fields fields and values linked to some Event Registration items linked to an Organisation record (Retrieved by Organisation Identifier)
SearchEventRegistrationByDynamicDataField (Integer , String)	Array of <Integer>	Get all the Event Registration identifiers. (Retrieved by Data Dynamic field and values)
InsertEventRegistration (EventRegistrationInfo)	Integer	Saves the information for the new Event Registration item.
UpdateEventRegistration (EventRegistrationInfo)		Saves the information for the existing Event Registration item.
GetDynamicDataSections (Integer)	Array of <DynamicDataSection>	Get all Custom Fields section records (Retrieved by Dynamic Field Type Identifier)
DeleteEventRegistrationBySessionIdentifier (Integer , EventRegistrationStatus)		Deletes Event Registration items linked to an existing Event Session. (Deleted by Event Registration status)
SaveDynamicDataByEventRegistration (Integer , Array of <DynamicDataField>)	Boolean	Save dynamic field values for an Event Registration item

5.9.3 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Event Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of <ReferenceDataItem> The reference data items for Event Type. Please see the Web Service Data Model section for further information.

5.9.4 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Event Category.
Parameters	<p>Integer <i>TypeIdentifier</i></p> <p>The Type identifier which is used to filter the Event Category items which has the specified Type identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Event Category. Please see the Web Service Data Model section for further information.</p>

5.9.5 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Event Sub Category.
Parameters	<p>Integer <i>CategoryIdentifier</i></p> <p>The Category identifier which is used to filter the Event Category items which has the specified Category identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Event Sub Category. Please see the Web Service Data Model section for further information.</p>

5.9.6 GetEventRegistrations

Operation	GetEventRegistrations
Description	Get all Event Registration items showing the information about the status, booking number, booking date and other details.
Parameters	<none>
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.7 GetEventRegistrationsByEvent

Operation	GetEventRegistrationsByEvent
Description	Get all Event Registration items linked to an Event.
Parameters	Integer <i>EventIdentifier</i> The Event identifier
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.8 GetEventRegistrationsBySession

Operation	GetEventRegistrationsBySession
Description	Get all Event Registration items linked to an Event Session.
Parameters	Integer <i>EventSessionIdentifier</i> The Event Session identifier.
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.9 GetEventRegistrationsBySessionAndRegistrationStatus

Operation	GetEventRegistrationsBySessionAndRegistrationStatus
Description	Get all Event Registration items linked to an Event Session by Event Registration Status.
Parameters	Integer <i>EventSessionIdentifier</i> The Event Session identifier.

	EventRegistrationStatus <i>EventRegistrationStatus</i> The Event Registration Status.
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.10 GetEventRegistrationsByContact

Operation	GetEventRegistrationsByContact
Description	Get all Event Registration items linked to a Contact.
Parameters	Integer <i>ContactIdentifier</i> The Contact identifier.
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.11 GetEventRegistrationsByOrganisation

Operation	GetEventRegistrationsByOrganisation
Description	Get all Event Registration items linked to an Organisation.
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier.
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.12 GetEventRegistrationsByRegistrationStatus

Operation	GetEventRegistrationsByRegistrationStatus
Description	Get all Event Registration items based on Event Registration Status.
Parameters	EventRegistrationStatus <i>EventRegistrationStatus</i> The Event Registration Status.
Returns	Array of < EventRegistrationInfo > The returned result of the Event Registration information details.

5.9.13 GetEventRegistration

Operation	GetEventRegistration
Description	Get the information about an Event Registration item such as the status, booking number, booking date and other details by using the Event Session identifier.
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier.
Returns	EventRegistrationInfo The returned result of the Event Registration information details.

5.9.14 GetDynamicDataByEvent

Operation	GetDynamicDataByEvent
Description	Get all Custom Fields fields and values linked to some Event Registration items under an Event (Retrieved by Event Identifier)
Parameters	Integer <i>EventIdentifier</i> The Event identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.9.15 GetDynamicDataBySession

Operation	GetDynamicDataBySession
Description	Get all Custom Fields fields and values linked to some Event Registration items under an Event Session item (Retrieved by Event Session Identifier)
Parameters	Integer <i>EventSessionIdentifier</i> The Event Session identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.9.16 GetDynamicDataByRegistration

Operation	GetDynamicDataByRegistration
Description	Get all Custom Fields fields and values linked to an Event Registration item (Retrieved by Event Registration Identifier)
Parameters	Integer <i>EventRegistrationIdentifier</i> The Event Registration identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.9.17 GetDynamicDataByContact

Operation	GetDynamicDataByContact
Description	Get all Custom Fields fields and values linked to some Event Registration items linked to a Contact record (Retrieved by Contact Identifier)
Parameters	Integer <i>ContactIdentifier</i> The Contact identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.9.18 GetDynamicDataByOrganisation

Operation	GetDynamicDataByOrganisation
Description	Get all Custom Fields fields and values linked to some Event Registration items linked to an Organisation record (Retrieved by Organisation Identifier)
Parameters	Integer <i>OrganisationIdentifier</i> The Organisation identifier.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields Section information

5.9.19 SearchEventRegistrationByDynamicDataField

Operation	SearchEventRegistrationByDynamicDataField
Description	Get all the Event Registration identifiers. (Retrieved by Data Dynamic field and values)
Parameters	<p>Integer <i>fieldId</i> The Custom Fields Field unique identifier.</p> <p>String <i>searchValue</i> The Custom Fields Field value.</p>
Returns	<p>Array of Integer></p> <p>A collection of Event Registration identifiers.</p>

5.9.20 InsertEventRegistration

Operation	InsertEventRegistration
Description	Saves the information for the new Event Registration item.
Parameters	<p>EventRegistrationInfo <i>EventRegistrationDetails</i> The object that contains the information for the new Event Registration item.</p>
Returns	<p>Integer The unique identifier of the new Event Registration item.</p>

5.9.21 UpdateEventRegistration

Operation	UpdateEventRegistration
Description	Saves the information for the existing Event Registration item.
Parameters	<p>EventRegistrationInfo <i>EventRegistrationDetails</i> The object that contains the new information for the existing Event Registration item.</p>
Returns	<none>

5.9.22 GetDynamicDataSections

Operation	GetDynamicDataSections
Description	Get all Custom Fields section record (Retrieved by Dynamic Field Data Type)
Parameters	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.9.23 DeleteEventRegistrationBySessionIdentifier

Operation	DeleteEventRegistrationBySessionIdentifier
Description	Deletes Event Registration items linked to an existing Event Session. (Deleted by Event Registration status)
Parameters	Integer <i>EventSessionIdentifier</i> The unique identifier of the Event Session item. EventRegistrationStatus <i>EventRegistrationStatus</i> The status of the Event Registration items to delete.
Returns	<none>

5.9.24 SaveDynamicDataByEventRegistration

Operation	SaveDynamicDataByEventRegistration
Description	Save dynamic field values for an Event Registration item.
Parameters	Integer <i>EventRegistrationIdentifier</i> The unique identifier of the Event item. Array of < DynamicDataField > <i>DynamicDataFieldValues</i> A collection of Custom Fields fields and values to store against the Event Registration item.
Returns	Boolean A value of <i>true</i> means the Custom Fields values were successfully saved for an event registration item; otherwise, <i>false</i>

5.9.25 GetEventRegistrationStatusList

Operation	GetEventRegistrationStatusList
Description	Get all Event Registration Status in the system.
Parameters	<none>
Returns	Array of < EventSessionRegistrationStatus > The returned result of the Event Registration Status information

5.10 DistributionListManager

The Distribution List Manager Web Service provides the facility to retrieve Distribution List data which contains the Distribution List name.

The list of Web Service methods for DistributionListManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/DistributionListManager.aspx

Notes:

- XYZ is the name of your Web Server which hosts ChilliDB
- ChilliDB is the name of your ChilliDB web application share on your web server.
 - Default value is ChilliDB for clients hosting their own ChilliDB.
 - Some older systems may still use DIS instead of ChilliDB
 - Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.

The DistributionListManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has two data models that are mainly used within its domain. These data models are described below:

5.10.1 DistributionListItem

The DistributionListItem provides the information that forms the structure of the Distribution List record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Distribution List assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Distribution List Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Distribution List Category information	
Sub Category	ReferenceDataItem	Represents the Distribution List Sub Category information	
List Name	String (500)	The name of the Distribution List	The value is mandatory

5.10.2 DistributionListMemberItem

A member of a Distribution List can be either of a Contact type or an Organisation type. When a member is a Contact type, the information about the Organisation type in the response will not be populated. The same case also happen if a member is an Organisation type, the information about the Contact type in the response will not be populated.

The DistributionListMemberItem provides the information that forms the structure of the Distribution List Member record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Distribution List assigned by ChilliDB system	
List Name	String (500)	The name of the Distribution List	When performing an insert/update, this value is not required
Communication Id	Integer	The communication identifier belongs to a Member which is subscribed into the Distribution List	The value is mandatory
Communication Details	String	The communication details. This can be an email address, a fax number or a mobile number.	
Contact Id	Integer	The identifier of a Contact who is subscribed into the Distribution List.	The value is mandatory. This value is specified if the Member is a Contact type.
Contact Forename	String (25)	The Contact first name	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Middle Name	String (25)	The Contact middle name	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Surname	String (50)	The Contact last name	This value is shown only if the Member is a

			Contact type. When performing an insert/update, this value is not required
Contact Preferred Name	String (25)	The Contact preferred name	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Full Name	String	The Contact full name which includes the name title.	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Expired	DateTime	The expiry date of the Contact	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Organisation Id	Integer	This identifier of an Organisation which is linked to the Contact who is subscribed into the Distribution List.	This value is specified if the Member is a Contact type.
Contact Organisation Name	String (255)	The Contact Organisation Name	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Organisation Full Name	String	The Contact Organisation Full Name (includes the abbreviation if specified)	This value is shown only if the Member is a Contact type. When performing an insert/update, this value is not required
Contact Organisation Expired	DateTime	The expiry date of the Contact Organisation	This value is shown only if the Member is a Contact type.

			When performing an insert/update, this value is not required
Organisation Id	Integer	The identifier of an Organisation which is subscribed into the Distribution List.	This value is specified if the Member is an Organisation type.
Organisation Full Name	String	The Organisation Full Name (includes the abbreviation if specified)	This value is shown only if the Member is an Organisation type. When performing an insert/update, this value is not required
Organisation Name	String	The Organisation Name	This value is shown only if the Member is an Organisation type.
Organisation Expired	DateTime	The expiry date of the Organisation	This value is shown only if the Member is an Organisation type. When performing an insert/update, this value is not required
Member Expired	DateTime	The expiry date of the Member in the Distribution List.	This value is shown only when the Member is unsubscribed from the Distribution List.
Unsubscription Reason	String (255)	The reason why the Member is unsubscribed from the Distribution List	This value is shown only when the Member is unsubscribed from the Distribution List.
ListIdentifier	Integer	The identifier of a Distribution List to which the member is associated to	

In term of the operation support, the Distribution List Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Distribution List Manager Web Service

Method Signature	Return	Description
GetTypes(SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Distribution List Type.
GetCategories(Integer, SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Distribution List Category.
GetSubCategories(Integer, SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Distribution List Sub Category.
GetList(Integer)	DistributionListItem	Get information about a Distribution List item based on the list identifier.
GetLists()	Array of < DistributionListItem >	Get one or more Distribution List items in ChilliDB system.
GetListsByCommunicationAddress(String)	Array of < DistributionListItem >	Get one or more Distribution List items in ChilliDB system based on the communication address that the Distribution List contains.
GetMember(Integer)	DistributionListMemberItem	Get information about a member of Distribution List.
GetMembers(Integer, SelectExpired)	Array of < DistributionListMemberItem >	Get a list of members from a Distribution List.
GetMemberByCommunicationAddress(String, SelectExpired)	Array of < DistributionListMemberItem >	Get a list of members from a Distribution List by using the Member communication address.
Subscribe(Integer, Integer)	Integer	Subscribe a Contact or an Organisation by its selected communication item as a member of a Distribution List. Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.
Unsubscribe(Integer, Integer, String)	<none>	Unsubscribe a member from a Distribution List using the Distribution List identifier and the Communication identifier belongs to the Contact or

		<p>Organisation that will be unsubscribed.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p>
Resubscribe(Integer, Integer)	<none>	<p>Resubscribe a member into a Distribution List using the Distribution List identifier and the Communication identifier belongs to the Contact or Organisation that will be resubscribed.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p>
UnsubscribeByMember(Integer, String)	<none>	<p>Unsubscribe a member from a Distribution List using the Member identifier.</p> <p>By unsubscribing the member from a Distribution List, the member will no longer receive or be able to send any communication via the Distribution List in which the member has been unsubscribed.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p>
ResubscribeByMember(Integer)	<none>	<p>Resubscribe a member into a Distribution List using the Member identifier.</p> <p>By resubscribing the member into a Distribution List, the member will be able to start sending and receiving any communication via the Distribution List in which the member has been resubscribed.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p>

5.10.3 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Distribution List Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Distribution List Type. Please see the Web Service Data Model section for further information.

5.10.4 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Distribution List Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Distribution List Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Distribution List Category. Please see the Web Service Data Model section for further information.

5.10.5 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Distribution List Sub Category.
Parameters	Integer <i>CategoryIdentifier</i> The Category identifier which is used to filter the Distribution List Category items which has the specified Category identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Distribution List Sub Category. Please see the Web Service Data Model section for further information.

5.10.6 GetList

Operation	GetList
Description	Get information about one distribution list item based on the list identifier. Currently the result of will show the name of the distribution list.
Parameters	Integer <i>ListIdentifier</i> The Distribution List identifier
Returns	DistributionListItem The returned result of the Distribution List information details.

5.10.7 GetLists

Operation	GetLists
Description	Get one or more distribution list items in ChilliDB system. Currently the result of will show the distribution list names
Parameters	<none>
Returns	Array of < DistributionListItem > The returned result of the Distribution List information details.

5.10.8 GetListsByCommunicationAddress

Operation	GetListsByCommunicationAddress
Description	Get one or more distribution list items in ChilliDB system. Currently the result of will show the distribution list names
Parameters	<none>
Returns	Array of < DistributionListItem > The returned result of the Distribution List information details.

5.10.9 GetMember

Operation	GetMember
Description	Get information about a member of Distribution List. A member of a Distribution List can be either of a Contact type or an Organisation type. When a member is a Contact type, the information about

	<p>the Organisation type in the response will not be populated.</p> <p>The same case also happen if a member is an Organisation type, the information about the Contact type in the response will not be populated.</p>
Parameters	<p>Integer <i>MemberIdentifier</i></p> <p>The Distribution List Member identifier</p>
Returns	<p>DistributionListMemberItem</p> <p>The returned result of the Distribution List Member information details.</p>

5.10.10 GetMembers

Operation	GetMembers
Description	<p>Get a list of members from a Distribution List.</p> <p>A member of a Distribution List can be either of a Contact type or an Organisation type. When a member is a Contact type, the information about the Organisation type in the response will not be populated.</p> <p>The same case also happen if a member is an Organisation type, the information about the Contact type in the response will not be populated.</p>
Parameters	<none>
Returns	<p>Array of <DistributionListMemberItem></p> <p>The returned result of the Distribution List Member information details.</p>

5.10.11 GetMemberByCommunicationAddress

Operation	GetMemberByCommunicationAddress
Description	<p>Get a list of members from a Distribution List.</p> <p>A member of a Distribution List can be either of a Contact type or an Organisation type. When a member is a Contact type, the information about the Organisation type in the response will not be populated.</p> <p>The same case also happen if a member is an Organisation type, the information about the Contact type in the response will not be populated.</p>
Parameters	<p>Integer <i>ListIdentifier</i></p> <p>The Distribution List identifier</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <DistributionListMemberItem></p>

	The returned result of the Distribution List Member information details.
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5.10.12 Subscribe

Operation	Subscribe
Description	<p>Subscribe a Contact or an Organisation by its selected communication item as a member of a Distribution List.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p> <p>By becoming a member of a Distribution List, a Contact or an Organisation can receive or send a communication via the Distribution List.</p>
Parameters	<p>Integer <i>ListIdentifier</i></p> <p>The Distribution List identifier</p>
	<p>Integer <i>CommunicationIdentifier</i></p> <p>The identifier belongs to the Communication item owned by the Member of either the Contact or Organisation type.</p>
Returns	<p>Integer</p> <p>The unique identifier assigned by the system for the Member record.</p>

5.10.13 Unsubscribe

Operation	Unsubscribe
Description	<p>Subscribe a Contact or an Organisation by its selected communication item as a member of a Distribution List.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p> <p>By becoming a member of a Distribution List, a Contact or an Organisation can receive or send a communication via the Distribution List.</p>
Parameters	<p>Integer <i>ListIdentifier</i></p> <p>The Distribution List identifier</p>
	<p>Integer <i>CommunicationIdentifier</i></p> <p>The identifier belongs to the Communication item owned by the Member of either the Contact or Organisation type.</p>
	<p>String <i>Reason</i></p> <p>The reason of the Member being unsubscribed from the Distribution List.</p>

Returns	<none>
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5.10.14 Resubscribe

Operation	Resubscribe
Description	<p>Resubscribe a member into a Distribution List using the Distribution List identifier and the Communication identifier belongs to the Contact or Organisation that will be resubscribed.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p> <p>By resubscribing the member into a Distribution List, the member will be able to start sending and receiving any communication via the Distribution List in which the member subscription is reactivated.</p>
Parameters	<p>Integer <i>ListIdentifier</i></p> <p>The Distribution List identifier</p>
	<p>Integer <i>CommunicationIdentifier</i></p> <p>The identifier belongs to the Communication item owned by the Member of either the Contact or Organisation type.</p>
Returns	<none>

5.10.15 UnsubscribeByMember

Operation	UnsubscribeByMember
Description	<p>Unsubscribe a member from a Distribution List by using the Member identifier.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p> <p>By unsubscribing the member from a Distribution List, the member will no longer receive or be able to send any communication via the Distribution List in which the member has been unsubscribed.</p>
Parameters	<p>Integer <i>MemberIdentifier</i></p> <p>The Distribution List Member identifier</p>
	<p>String <i>Reason</i></p> <p>The reason of the Member being unsubscribed from the Distribution List.</p>
Returns	<none>

5.10.16 ResubscribeByMember

Operation	ResubscribeByMember
Description	<p>Resubscribe a member into a Distribution List using the Member identifier.</p> <p>Send notification to the users which roles are linked to the Role Notification Settings setup for the Distribution List.</p> <p>By resubscribing the member into a Distribution List, the member will be able to start sending and receiving any communication via the Distribution List in which the member subscription is reactivated.</p>
Parameters	<p>Integer <i>MemberIdentifier</i></p> <p>The Distribution List Member identifier</p>
Returns	<none>

5.11 CommunicationManager

The Communication Manager Web Service provides the facility to retrieve Communication data such as the details (email address or phone/fax number), the communication type, and the linkage of the communication item to a Contact or an Organisation record..

The list of Web Service methods for CommunicationManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/CommunicationManager.aspx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The CommunicatoinManager Web Service uses a number of web service data models as described below:

5.11.1 CommunicationInfo

The CommunicationInfo provides the information about the communication item such as Phone Number, Fax Number, or E-mail Address. It also provides the linkage of the communication item to a Contact or an Organisation record. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Communication Id	Integer	The identifier of the communication item	
Contact Id	Integer	The identifier of the Contact who owns the communication item	
Value	String	The communication item value	The value is mandatory
Contact Display Value	String	The description value of the Contact Full Name.	The value is shown only when the Contact Id is supplied.
Communication	String	The description value of	The value is

Display Value		the communication item	mandatory
Type Description Value	String (100)	<p>The communication item type description.</p> <p>ChilliDB provides 8 different communication types which are available for selection when saving the CommunicationInfo item:</p> <ol style="list-style-type: none"> 1. Business E-mail 2. Personal E-mail 3. Business Fax 4. Personal Fax 5. Business Mobile 6. Business Phone 7. Personal Mobile 8. Personal Phone <p>Apart from the above types, ChilliDB also supports new user defined types.</p> <p>The User can specify the new type into this field. If the new type is not found, then ChilliDB will add the new type automatically.</p>	<p>The value is mandatory.</p> <p>There can be only one Communication Type for each Communication item owned by a Contact or an Organisation.</p> <p>Attempting to add a Communication item for an existing Contact or Organisation which already has the specified Communication Type will return an exception as it violates the unique Communication Type rule for the Contact's or Organisation's Communication items.</p>
Current Communication Type	CommunicationType	The communication item type	The value is mandatory
Organization Id	Integer	The identifier of the Organisation who owns the communication item. This identifier can also belong to the Organisation which is linked to the Contact who owns the communication item.	The value is mandatory
Organization Display Value	String	The description value of the Organisation Name.	When performing an insert/update, this value is not required
Communication Entity Type	CommunicationEntityType	The entity type of the record that the	The value is mandatory. If

		communication item is linked to. The value can be either <code>Contact</code> or <code>Organization</code> .	Contact is specified, then the ContactId value becomes mandatory
External Id	Array of String	The external identifiers defined for the communication item. This field is exclusively used internally by Polymorphic Solutions.	
Display	String	The description value of either a combination of Contact Name and Organisation Name or just the Organisation Name, and then followed by the communication item type description and lastly added with the communication item value. E.g. Joe Bloggs (ACME) – Business E-mail: jbloggs@acme.com	When performing an insert/update, this value is not required
Distribution List Id	Integer	The identifier of the Distribution List item that holds the current communication item.	
Client Id	Integer	The identifier of the Client who owns the communication item	This is only used with Client Administration Module
Client Display Value	Integer	The description value of the Client Full Name including the Client Key Number	This is only used with Client Administration Module
Client Display Value Simple	Integer	The description value of the Client Full Name.	This is only used with Client Administration Module
Organization Display Value Simple	Integer	The description value of the Organisation Full Name.	

Contact Display Value Simple	Integer	The description value of the Contact Full Name.	
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5.11.2 CommunicationTypeReferenceItem

The CommunicationTypeReference provides the information about the Communication Type used by the system logic to determine the way of Communication item being managed. The model exhibits the following information through the web service:

Name	Data Type	Description	Additional Rules
Communication Type	CommunicationType	<p>The system type of the Communication item. The ChilliDB system has defined several standard types such as <i>Email, MobilePhone, Fax, or Other.</i></p> <p>Please see CommunicationType from the Additional ChilliDB Pre-defined Types section.</p>	

In addition to the CommunicationInfo and CommunicationTypeReferenceItem, the Communication Manager also utilises ContactOrganisationResult as web service data model within the CommunicationManager web service domain. In order to see the definition of the ContactOrganisationResult data model, please refer to [Web Service Data Model](#) section.

In term of the operation support, the Communication Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Communication Manager Web Service

Method Signature	Return	Description
GetCommunicationTypes()	Array of < CommunicationTypeReferenceItem >	Get the Communication Type items available in the system.
UserPreferredEmail()	CommunicationInfo	Get the preferred email address which is belonged to the user account specified in the Authentication information .
GetCommunication(Integer)	CommunicationInfo	Get the Communication item based on the Communication

		identifier
Search(String, SelectExpired)	Array of < CommunicationInfo >	Search the Communication items based on the Communication detail value and the expiry status
FindContactOrganisationByCommunication(String, SelectExpired)	Array of < ContactOrganisationResult >	Search the Contact and Organisation association records based on the Communication detail value and the expiry status
SearchByOrganisation(String, String, SelectExpired)	Array of < ContactOrganisationResult >	Get the Contact and Organisation associations by using the Organisation name and abbreviation. The result can also be filtered further by excluding the expired records.
SearchByContact(String, String, String, String, ExpireStatus)	Array of < ContactOrganisationResult >	Get the Contact and Organisation associations by using the Contact first name, middle name, surname, and preferred name. The result can also be filtered further by excluding the expired records.

5.11.3 GetCommunicationTypes

Operation	GetCommunicationTypes
Description	Get the Communication Type items available in the system.
Parameters	<none>
Returns	Array of < CommunicationTypeReferenceItem > The returned result of the Communication Type items.

5.11.4 UserPreferredEmail

Operation	UserPreferredEmail
Description	Get the preferred email address which is belonged to the user account specified in the Authentication information .

Parameters	<none>
Returns	CommunicationInfo The returned result of the Communication item details.

5.11.5 GetCommunication

Operation	GetCommunication
Description	Get the Communication item based on the Communication identifier
Parameters	<none>
Returns	CommunicationInfo The returned result of the Communication item details.

5.11.6 Search

Operation	Search
Description	Search the Communication items based on the Communication detail value and the expiry status
Parameters	String <i>strCommunicationValue</i> The communication detail value to be searched on the system.
	SelectExpired <i>enuExpired</i> The option to filter the expired reference data.
Returns	Array of < CommunicationInfo > The returned result of the Communication item details.

5.11.7 FindContactOrganisationByCommunication

Operation	FindContactOrganisationByCommunication
Description	Search the Contact and Organisation association records based on the Communication detail value and the expiry status
Parameters	String <i>strCommunicationValue</i> The communication detail value to be searched on the system.
	SelectExpired <i>enuExpired</i> The option to filter the expired reference data.

Returns	<p>Array of <ContactOrganisationResult></p> <p>The returned result of the Contact and Organisation association details.</p>
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5.11.8 SearchByOrganisation

Operation	SearchByOrganisation
Description	<p>Get the Contact and Organisation associations by using the Organisation name and abbreviation.</p> <p>The result can also be filtered further by excluding the expired records.</p>
Parameters	<p>String <i>strName</i> The Organisation name to be searched.</p>
	<p>String <i>strAbbreviation</i> The Organisation abbreviation to be searched.</p>
	<p>SelectExpired <i>enuExpired</i> The option to filter the expired reference data.</p>
Returns	<p>Array of <ContactOrganisationResult></p> <p>The returned result of the Contact and Organisation association details.</p>

5.11.9 SearchByContact

Operation	SearchByContact
Description	<p>Get the Contact and Organisation associations by using the Organisation name and abbreviation.</p> <p>The result can also be filtered further by excluding the expired records.</p>
Parameters	<p>String <i>strFirstname</i> The Contact first name to be searched.</p>
	<p>String <i>strMiddleName</i> The Contact middle name to be searched.</p>
	<p>String <i>strSurname</i> The Contact surname to be searched.</p>
	<p>String <i>strPreferredName</i> The Contact preferred name to be searched.</p>
	<p>SelectExpired <i>enuExpired</i></p>

	The option to filter the expired reference data.
Returns	<p>Array of <ContactOrganisationResult></p> <p>The returned result of the Contact and Organisation association details.</p>

5.12 NotificationManager

The Notification Manager Web Service provides the facility to retrieve the ChilliDB Alert information. The web service also provides the facility to add a new Alert into the system.

The list of Web Service methods for NotificationManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/NotificationManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The NotificationManager Web Service uses a web service data model called AlertInfo which is described below:

5.12.1 AlertInfo

The AlertInfo provides the information that forms the structure of the Alert item. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Alert item by ChilliDB system	
Type	Alert_Type	The type of the Alert item	
Description	String (200)	The title description of the Alert item	
Due Date	DateTime	The date and time of when the Alert should be due	
Importance Flag	ReferenceDataItem	The status of importance of the Alert item	
Entity Id	Integer	The identifier linked to the Entity in which the entity identifies the location of the Alert where it is created	
Comments	String (255)	The additional comments to be added to the Alert item	

Is Read	Boolean	The status if the Alert item has been read	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired	When performing an insert/update, this value is not required.

In term of the operation support, the Notification Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Notification Manager Web Service

Method Signature	Return	Description
GetImportanceFlags (Boolean)	Array of ReferenceDataItem	Get the Alert status of importance items.
GetActiveAlerts ()	Array of AlertInfo	Get all active Alerts in the system.
InsertAlert (Integer , Alert Type , String , DateTime , Array of Integer >, Integer , String)	Integer	Insert an Alert item into the system.

5.12.2 GetImportanceFlags

Operation	GetImportanceFlags
Description	Get the Alert status of importance items.
Parameters	<p>Boolean <i>IncludeInUseFlagsOnly</i></p> <p>The option to filter the returned important status items if they are or are not used by the Alert items.</p> <p>If the value is set to <i>true</i> then the returned values will only contain any important status items which have been used by the Alert items.</p>
Returns	Array of < ReferenceDataItem >

5.12.3 GetActiveAlerts

Operation	GetActiveAlerts
Description	Get all active Alerts in the system.
Parameters	<none>
Returns	<p>Array of <AlertInfo></p> <p>The returned result of the Alert item details.</p>

5.12.4 InsertAlert

Operation	InsertAlert
Description	Insert an Alert item into the system.
Parameters	<p>Integer <i>AlertRecordIdentifier</i></p> <p>The record identifier that is linked to the Alert item.</p> <p>The identifier can belongs to a Contact, Organisation, Note, or Event record depending on the specified Alert Type.</p>
	<p>Alert_Type <i>AlertRecordType</i></p> <p>The type of the Alert item.</p>
	<p>String <i>Description</i></p> <p>The description of the Alert item.</p>
	<p>Array of <Integer> <i>AlertUserAssociation</i></p> <p>A list of User identifiers which are linked to the Alert item.</p> <p>The user identifiers indicate which users who will receive the Alert item on</p>

	their Alert popup screen.
	<p><u>Integer</u> <i>ImportanceFlagIdentifier</i></p> <p>The identifier of the Importance Flag reference data item.</p> <p>In order to retrieve the Importance Flags reference data item, use the web method called <u>GetImportanceFlags</u>.</p>
	<p><u>String</u> <i>Comments</i></p> <p>The comments to be added to the Alert item.</p>
Returns	<p><u>Integer</u></p> <p>The identifier of the Alert item assigned by the system.</p>

5.13 CaseManager

The Case Manager Web Service provides the facility to retrieve Case Management module data such as the case reference number, description, case status, client and manager details, and so on. The web service also provides the facility to save a Case data, expire a Case, and associate a Note with an existing Case.

The list of Web Service methods for CaseManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/CaseManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The CaseManager Web Service uses a web service data model called CaseInfo which is described below:

5.13.1 CaseInfo

The *CaseInfo* provides the information that forms the structure of the Case record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Case assigned by ChilliDB system	
Reference Number	String (100)	The Case reference number.	The reference number can use a number of different formats. The number can have a prefix, a suffix or both.
Reference Display Name	String	The Case reference number with additional status to indicate if the Case has been expired.	
Description	String	The Case description.	
Reference Number Format Identifier	Integer	The identifier linked to the Reference Number Format. The value can be one of the	When reference number format is system generated, any prefix or suffix

		<p>following:</p> <p>1 – System Generated</p> <p>In this format the reference number will be automatically generated by the system.</p> <p>2 – User Supplied</p> <p>In this format the reference number will be supplied by the user.</p>	<p>defined for the configuration settings from the Case Type will be appended automatically when the Case is inserted.</p> <p>When the reference number format is user supplied, any value entered by the user will become the value of the reference number.</p>
Reference Number Format Description	String	The linked to the Reference Number Format.	
Case Status Identifier	Integer	The identifier linked to the Case Status.	
Case Status Description	String	The Case Status description	When performing an insert/update, this value is not required.
Contact Client Identifier	Integer	The Contact identifier linked to the Case client.	The value is mandatory
Contact Client Full Name	String	The Contact full name linked to the Case client.	When performing an insert/update, this value is not required.
Contact Case Manager Identifier	Integer	The Contact identifier linked to the Case manager.	
Contact Case Manager Full Name	String	The Contact full name linked to the Case manager.	When performing an insert/update, this value is not required.
Client Admin Client Identifier	Integer	The Client Admin identifier linked to the Case client.	
Client Admin Client Full Name	String	The Client Admin full name linked to the Case client.	When performing an insert/update, this value is not required.
Organisation Client Identifier	Integer	The Organisation identifier linked to the Case client.	
Organisation Client Full Name	String	The Organisation full name linked to the Case client.	When performing an insert/update, this value is not required.

Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required.
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required.
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	When performing an insert/update, this value is not required.

5.13.2 CaseActivityInfo

The *CaseActivityInfo* provides the information that forms the structure of the Case Activity record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Case Activity assigned by ChilliDB system	
Name	String (100)	The name of the Case Activity	
Case Identifier	String	The parent identifier (Case Identifier) of the Case Activity	

5.13.3 CaseTypeConfigurationInfo

The *CaseTypeConfigurationInfo* provides the information about the configuration settings linked to a Case Type. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Description	String	The Case Type description	
Reference Number Format Identifier	Integer	<p>The identifier linked to the Reference Number Format.</p> <p>The value can be one of the following:</p> <p>1 – System Generated</p> <p>In this format the reference number will be automatically generated by the system.</p> <p>2 – User Supplied</p> <p>In this format the reference number will be supplied by the user.</p>	<p>When reference number format is system generated, any prefix or suffix defined for the configuration settings from the Case Type will be appended automatically when the Case is inserted.</p> <p>When the reference number format is user supplied, any value entered by the user will become the value of the reference number.</p>
Reference Number Format Description	String	The description linked to the Reference Number Format.	
Reference Number Suffix	String (1000)	The suffix value to be appended to the reference number.	
Reference Number Prefix	String (1000)	The prefix value to be appended to the reference number.	
Reference Number Default Value	String (1000)	The default value which will be assigned as a reference number when there is no number supplied by the user.	<p>If a prefix/suffix is specified, then the default value will contain the prefix/suffix value.</p> <p>The default value can contain both prefix and suffix when they are both defined in the configuration settings for the Case Type.</p>

Expired	DateTime	The date and time when the record is expired.	
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In term of the operation support, the Case Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Case Manager Web Service

Method Signature	Return	Description
GetCaseTypeWithReferenceSettings (Boolean , SelectExpired , Boolean , Integer)	Array of <CaseTypeConfigurationInfo>	Get the Case Type configuration settings stored in the system.
SearchCaseByReferenceNumberOrClient (Array of <String> , ExpireStatus)	Array of <CaseInfo>	Search Cases information by using the Case reference number or the client name keywords and the expiry status of the Case.
InsertCase (CaseInfo)	Integer	Save the Case information.
ExpireCase (Integer)	<none>	Make an existing Case expired.
AssociateNoteToCase (Integer , Integer , Integer)	<none>	Link a Note into an existing Case. The Note can also be linked to the Case Activity which is part of the Case data.
AssociateNoteToCaseAndClient (Integer , Integer , Integer)	<none>	Link a Client Note into an existing Case. The Client Note can also be linked to the Case Activity which is part of the Case data.
CancelCase (Integer)	<none>	Expire the Case provided the case's status is Un-Allocated and the case does not have any Case Template associated to it.

GetCaseActivities (Integer , ExpireStatus)	Array of < CaseActivityInfo >	Get the Case Activity records by Case
GetCaseClientType (Integer)	Client_Type	Get the client Type based on Case Type

5.13.4 GetCaseTypeWithReferenceSettings

Operation	GetCaseTypeWithReferenceSettings
Description	Get the Case Type configuration settings stored in the system.
Parameters	<p>Boolean <i>blnInUseOnly</i></p> <p>The option to filter the returned case types if they are or are not used by the Case records.</p> <p>If the value is set to <i>true</i> then the returned values will only contain any case types which have been used by the Contact records.</p>
	<p>SelectExpired <i>enuExpired</i></p> <p>The option to filter the expired case types.</p>
	<p>Boolean <i>blnIncludeConfiguredTypeOnly</i></p> <p>The option to filter the returned case types if they have or have not been configured in the system.</p>
	<p>Integer <i>intSavedTypeIdentifier</i></p> <p>The identifier of the Case Type in the system which is used to include the Case Type item regardless if the Case Type has been expired, has not been used by any Cases, or has not been configured.</p>
Returns	<p>Array of <CaseTypeConfigurationInfo></p> <p>The returned result of the configuration settings details linked to the Case Types.</p>

5.13.5 SearchCaseByReferenceNumberOrClient

Operation	SearchCaseByReferenceNumberOrClient
Description	Search Cases information by using the Case reference number or the client name keywords and the expiry status of the Case.
Parameters	<p>Array of <String> <i>aryKeywords</i></p> <p>The client name keywords to be searched.</p>
	ExpireStatus <i>enuExpireStatus</i>

	The option to filter the expired cases.
Returns	Array of < CaseInfo > The returned result of the Case information details.

5.13.6 InsertCase

Operation	InsertCase
Description	Save the Case information.
Parameters	CaseInfo <i>objCaseInfo</i> The Case information details that is going to be saved.
Returns	Integer The unique identifier assigned to the Case record by the system

5.13.7 ExpireCase

Operation	ExpireCase
Description	Make an existing Case expired. The web method can also be used to un-expire the case.
Parameters	Integer <i>intCaseIdentifier</i> The Case identifier.
	Boolean <i>blnExpire</i> The option to set the Case expired or un-expired. In order to make the Case expired, set the value to <i>true</i> . Setting the value to <i>false</i> will make the Case un-expired.
Returns	<none>

5.13.8 AssociateNoteToCase

Operation	AssociateNoteToCase
Description	Link a Note into an existing Case. The Note can also be linked to the Case Activity which is part of the Case data.
Parameters	Integer <i>intCaseIdentifier</i> The Case identifier.

	<p><u>Integer</u> <i>intNoteIdentifier</i></p> <p>The Note identifier to be linked to the Case record.</p> <p>This value is mandatory and the Note record to be associated to the Case must exist in the system.</p>
	<p><u>Integer</u> <i>intCaseActivityIdentifier</i></p> <p>The identifier of the Case Activity belongs to the Case. When specifying the Case Activity identifier in addition to the Case identifier, the Note will be linked to the Case Activity instead of the Case.</p>
Returns	<none>

5.13.9 AssociateNoteToCaseAndClient

Operation	AssociateNoteToCaseAndClient
Description	Link a Client Note into an existing Case. The Client Note can also be linked to the Case Activity which is part of the Case data.
Parameters	<p><u>Integer</u> <i>intCaseIdentifier</i></p> <p>The Case identifier.</p>
	<p><u>Integer</u> <i>intNoteIdentifier</i></p> <p>The Note identifier to be linked to the Case record.</p> <p>This value is mandatory and the Note record to be associated to the Case must exist in the system.</p>
	<p><u>Integer</u> <i>intCaseActivityIdentifier</i></p> <p>The identifier of the Case Activity belongs to the Case. When specifying the Case Activity identifier in addition to the Case identifier, the Note will be linked to the Case Activity instead of the Case.</p>
Returns	<none>

5.13.10 CancelCase

Operation	CancelCase
Description	Expire the Case provided the case's status is Un-Allocated and the case does not have any Case Template associated to it.
Parameters	<p><u>Integer</u> <i>intCaseIdentifier</i></p> <p>The Case identifier.</p>
Returns	<none>

5.13.11 GetCaseActivities

Operation	GetCaseActivities
Description	Get the Case Activity records by Case
Parameters	Integer <i>intCaseIdentifier</i> The Case identifier.
	ExpireStatus <i>enuExpireStatus</i> The option to filter the expired case activities.
Returns	Array of < CaseActivityInfo > The returned result of the Case information details.

5.13.12 GetCaseClientType

Operation	GetCaseClientType
Description	Get the client Type based on Case Type
Parameters	Integer <i>CaseTypeIdentifier</i> The Case Type identifier.
Returns	Client_Type The returned result of the Case Client Type information.

5.14 MembershipManager

The Membership Manager Web Service provides the facility to retrieve Membership module data such as the list of Membership Packages. The web service also provides the facility to add a Member to an existing Membership Package.

The list of Web Service methods for MembershipManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/MembershipManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The MembershipManager Web Service uses a web service data model called MembershipPackage which is described below:

5.14.1 MembershipPackage

The *MembershipPackage* provides the information that forms the structure of the Membership Package record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Membership Package assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Membership Package Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Membership Package Category information	
Sub Category	ReferenceDataItem	Represents the Membership Package Sub Category information	
Description	String (200)	The description of the Membership Package.	
Period	ReferenceDataItem	The Period reference data value associated with this Membership Package.	

IsChargable	Boolean	A flag indicating if the Membership Package is a chargeable one.	
StartDate	DateTime	The starting date that the Membership Package is valid.	
EndDate	DateTime	The ending date that the Membership Package is valid.	
Price	Decimal	The price of the membership package including GST	
Base Price	Decimal	The price of the membership package excluding the GST	
GST	Decimal	GST percentage to be applied to the membership product	
Track Renewal Date	Boolean	Determines if the membership package will automatically monitor it's members renewal date	
Membership Duration	Integer	Determines the number of <Duration Unit Id> of the member's membership period	This is only used when the membership package tracks renewal date
Duration Unit Id	Integer	Determines the unit used to determine the period of the member's membership against a membership package	This is only used when the membership package tracks renewal date. Value can either be Days (0), Months (1) or Years (2)
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required.

Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required.
Modified Date	DateTime	The system date and time saved when the record was last modified	

5.14.2 MembershipPackageInfo

The *MembershipPackageInfo* provides the information that forms the structure of the Membership Package record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Membership Package assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Membership Package Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Membership Package Category information	
Sub Category	ReferenceDataItem	Represents the Membership Package Sub Category information	
Description	String (200)	The description of the Membership Package.	
Period	ReferenceDataItem	The Period reference data value associated with this Membership Package.	
IsChargable	Boolean	A flag indicating if the Membership Package is a chargeable one.	
StartDate	DateTime	The starting date that the	

		Membership Package is valid.	
EndDate	DateTime	The ending date that the Membership Package is valid.	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required.
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required.
Price	Decimal	The price of the membership package including GST	
Base Price	Decimal	The price of the membership package excluding the GST	
GST	Decimal	GST percentage to be applied to the membership product	
Track Renewal Date	Boolean	Determines if the membership package will automatically monitor it's members renewal date	
Membership Duration	Integer	Determines the number of <Duration Unit Id> of the member's membership period	This is only used when the membership package tracks renewal date
Duration Unit Id	Integer	Determines the unit used to determine the period of the member's membership against a membership	This is only used when the membership package tracks renewal date.

		package	Value can either be Days (0), Months (1) or Years (2)
Package Type Id	Integer	Determines if the membership package is for contact members only, organisation members only or both	Value can either be Contact (0), Organisation (1) or Both (2)

5.14.3 MembershipPackageProduct

The *MembershipPackageProduct* provides the information that forms the structure of the Membership Package Product record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Product assigned by ChilliDB system	
Name	String (100)	Name of the Product	
Description	String (500)	Detailed Description of the Product	
Unit Cost Ex GST	Decimal	Cost of the Product per unit excluding GST	
Unit Type	String (20)	Unit Type of the Product	
GST	Decimal	GST Amount	
Is Expired	Boolean	A flag indicating if the Product is expired or not	

5.14.4 MembershipMemberInfo

The *MembershipMemberInfo* provides the information that forms the structure of the Membership Member record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Member assigned by ChilliDB system	
MembershipPackage	MembershipPackageInfo	The Membership Package for the Member	
Contact	ContactInfo	The information of the Contact Member	
Organisation	OrganisationItem	The information of the Organisation Member	
Organisation Contact Representative	ContactInfo	The information of the Contact representing the Organisation Member	
Communication Detail	CommunicationInfo	The Communication details of the Member	
Key	String (50)	The key assigned to the Member	
Status	ReferenceDataItem	The Member status	
Date Joined	DateTime	The date and time the member joined the Membership Package	
End Date	DateTime	The date and time the membership ends	
Date Cancelled	DateTime	The date and time the membership was cancelled	
Cancellation Reason	String (500)	The reason why the membership was cancelled	
Fully Paid	Boolean	Determines whether the membership cost has been fully paid	
Created By User Id	Integer	The system user identifier indicating the	The value is mandatory

		creator of the record	
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	When performing an insert/update, this value is not required.

5.14.5 MemberPaymentInfo

The *MemberPaymentInfo* provides the information that forms the structure of the Membership Member Payment record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Payment record assigned by ChilliDB system	
Member	MembershipMemberInfo	The Membership Member the payment is for	
Amount	Decimal	Amount paid	
Payment Date	DateTime	The date and time the payment was made	
Receipt Code	String (200)	The receipt code for the	

		payment made	
Payment Method	ReferenceDataItem	The method of payment made	

Web Methods Listing for Membership Manager Web Service

Method Signature	Return	Description
GetPackages (SelectExpired)	Array of < MembershipPackage >	Get the Membership Packages.
AddMember (Integer , Integer , Integer , DateTime)	<none>	Add a Member into an existing Membership Package.
AddMemberDetails (Integer , Integer , Integer , Integer , Date , Integer , Integer)	Nullable Integer	Add a Member into an existing Membership Package.
AddPaidMember (Integer , Date , List of (Integer), Decimal , Integer , String)	Nullable Integer	Add Payment and Product Options for a Membership Package Member, marking the Member with "Member" status.
AddPaidMemberDetails (Integer , Date , List of (Integer), Decimal , Integer , String , Integer)	Nullable Integer	Add Payment and Product Options against a Member's Membership Package, marking the Member

		with "Member" status. Recalculate member's renewal date if the membership package was set to track its members' renewal date.
GetCategories(Integer, SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Membership Package Category.
GetMembershipStatusList()	Array of < MembershipPackage >	Get the reference data items about the Membership Member Status.
GetNotSelectedPackageProducts(Integer)	Array of < MembershipPackageProduct >	Get the products associated to the Membership Package that can be added as additional options against a member's membership .
GetPackageDetails(Integer)	MembershipPackage	Get the information about one Membership Package like

		Identifier and Description
GetPackageDetailsInfo(Integer)	MembershipPackageInfo	Get the information about one Membership Package like Identifier, Description, Renewal details
GetPackageProducts(Integer)	Array of < MembershipPackageProduct >	Get the products that are associated to the Membership Package
GetSubCategories(Integer, SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Membership Package Sub Category.
GetTypes(SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the Membership Package Type.
GetMemberDetailsByContact(Integer)	Array of < MembershipMemberInfo >	Get the Membership details for the Contact
GetMemberDetailsByContactAndPackage(Integer, Integer)	Array of < MembershipMemberInfo >	Get the Membership details for the Contact
GetMemberDetailsByIdentifier(Integer)	MembershipMemberInfo	Get the Membership information

GetMemberDetailsByOrganisation(Integer)	Array of < MembershipMemberInfo >	Get the Membership details for the Organisation
GetMemberDetailsByOrganisationAndPackage(Integer, Integer)	Array of < MembershipMemberInfo >	Get the Membership details for the Organisation
GetMemberDetailsByPackage(Integer)	Array of < MembershipMemberInfo >	Get the Membership details for the Membership Package
GetPaymentDetailsByContact(Integer)	Array of < MemberPaymentInfo >	Get the Membership Payment details for the Contact
GetPaymentDetailsByContactAndPackage(Integer, Integer)	Array of < MemberPaymentInfo >	Get the Membership Payment details for the Contact
GetPaymentDetailsById(Integer)	MemberPaymentInfo	Get the Membership Payment detail by Payment identifier
GetPaymentDetailsByMember(Integer)	Array of < MemberPaymentInfo >	Get the Membership Payment details by Membership Member identifier
GetPaymentDetailsByOrganisation(Integer)	Array of < MemberPaymentInfo >	Get the Membership Payment details for

		the Organisation
GetPaymentDetailsByOrganisationAndPackage(Integer, Integer)	Array of MemberPaymentInfo	Get the Membership Payment details for the Organisation

5.14.6 GetPackages

Operation	GetPackages
Description	Get the Membership Packages stored in the system.
Parameters	SelectExpired <i>enuExpired</i> The option to filter the expired Membership Packages.
Returns	Array of MembershipPackage The returned result of the Membership Packages list.

5.14.7 AddMember

Operation	AddMember
Description	Add a Member record to a given Membership Package.
Parameters	Integer <i>membershipPackageId</i> The unique identifier of the Membership Package to add the Member to.
	Integer <i>contactId</i> The unique identifier of the Contact to add as a Member.
	Integer <i>contactOrganisationId</i> The unique identifier of the Organisation the Contact is associated with.
	DateTime <i>joinedDate</i> The date on which the member should be considered to have joined.
Returns	Nullable Integer The Member's unique record identifier if the addition was successful, null otherwise.

5.14.8 AddMemberDetails

Operation	AddMemberDetails
Description	Add a Member into an existing Membership Package.
Parameters	<p>Integer <i>membershipPackageId</i> The unique identifier of the Membership Package to add the Member to.</p> <p>Integer <i>contactId</i> The unique identifier of the Contact to add as a Member.</p> <p>Integer <i>contactOrganisationId</i> The value is either the unique identifier of the Organisation the Contact to be added as member is associated with, or the unique identifier of the Organisation to be added as member.</p> <p>Integer <i>organisationRepresentativeContactId</i> The unique identifier of the Contact for the Organisation to add as a Member. The value is needed if the Membership Package structure is Organisation or Both.</p> <p>DateTime <i>joinedDate</i> The date on which the member should be considered to have joined.</p> <p>Integer <i>membershipStatus</i> The unique identifier of the status of the member to be added.</p> <p>Integer <i>emailCommunicationId</i> The unique identifier of the communication id of the member to be added</p>
Returns	<p>Nullable Integer The Member's unique record identifier if the addition was successful, null otherwise.</p>

5.14.9 AddPaidMember

Operation	AddPaidMember
Description	Add Payment and Product Options against a Member's Membership Package, marking the Member with "Member" status.
Parameters	<p>Integer <i>intMemberID</i> The unique identifier of the member.</p> <p>DateTime <i>joinedDate</i> The date on which the member should be considered to have joined.</p>

	<p>List Of (Integer) <i>intOptionIDs</i></p> <p>The list of Membership Package option identifiers to be added against the member's membership package</p>
	<p>Decimal <i>decAmount</i></p> <p>The amount of payment to be added against the member's membership package.</p>
	<p>Integer <i>intPaymentType</i></p> <p>The type of payment.</p>
	<p>String <i>strReceiptCode</i></p> <p>The receipt code associated with the payment.</p>
Returns	<p>Nullable Integer</p> <p>The Member's unique record identifier if the payment addition was successful, null otherwise.</p>

5.14.10 AddPaidMemberDetails

Operation	AddPaidMemberDetails
Description	<p>Add Payment and Product Options against a Member's Membership Package, marking the Member with "Member" status.</p> <p>Recalculate member's renewal date if the membership package was set to track its members' renewal date.</p>
Parameters	<p>Integer <i>intMemberID</i></p> <p>The unique identifier of the member.</p>
	<p>DateTime <i>joinedDate</i></p> <p>The date on which the member should be considered to have joined.</p>
	<p>List Of (Integer) <i>intOptionIDs</i></p> <p>The list of Membership Package option identifiers to be added against the member's membership package</p>
	<p>Decimal <i>decAmount</i></p> <p>The amount of payment to be added against the member's membership package.</p>
	<p>Integer <i>intPaymentType</i></p> <p>The type of payment.</p>
	<p>String <i>strReceiptCode</i></p>

	The receipt code associated with the payment.
	Integer <i>membershipId</i> The unique identifier of the membership package
Returns	Nullable Integer The Member's unique record identifier if the payment addition was successful, null otherwise.

5.14.11 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Membership Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Membership Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Membership Category. Please see the Web Service Data Model section for further information.

5.14.12 GetMembershipStatusList

Operation	GetMembershipStatusList
Description	Get the reference data items about the Membership Member Status.
Parameters	<none>
Returns	Array of < MembershipPackage > The reference data items for Membership Status List

5.14.13 GetNotSelectedPackageProducts

Operation	GetNotSelectedPackageProducts
Description	Get the products associated to the Membership Package that can be added as additional options against a member's membership.
Parameters	Integer <i>intPackageId</i>

	The unique identifier of the Membership Packages.
Returns	Array of < MembershipPackageProduct > The returned result of the Membership Package Products list.

5.14.14 GetPackageDetails

Operation	GetPackageDetails
Description	Get the information about one Membership Package like Identifier and Description
Parameters	Integer <i>intPackageId</i> The unique identifier of the Membership Packages.
Returns	MembershipPackage The returned result of the basic Membership Package information details.

5.14.15 GetPackageDetailsInfo

Operation	GetPackageDetailsInfo
Description	Get the information about one Membership Package like Identifier, Description, Renewal details
Parameters	Integer <i>intPackageId</i> The unique identifier of the Membership Packages.
Returns	MembershipPackageInfo The returned result of the Membership Package information details.

5.14.16 GetPackageProducts

Operation	GetPackageProducts
Description	Get the products that are associated to the Membership Package
Parameters	Integer <i>intPackageId</i> The unique identifier of the Membership Packages.
Returns	Array of < MembershipPackageProduct > The returned result of the Membership Package Products list.

5.14.17 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Membership Package Sub Category.
Parameters	<p>Integer <i>CategoryIdentifier</i></p> <p>The Category identifier which is used to filter the Membership Package Category items which has the specified Category identifier as the parent identifier.</p>
	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Membership Package Sub Category. Please see the Web Service Data Model section for further information.</p>

5.14.18 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Membership Package Type.
Parameters	<p>SelectExpired <i>SelectExpired</i></p> <p>The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Membership Package Type. Please see the Web Service Data Model section for further information.</p>

5.14.19 GetMemberDetailsByContact

Operation	GetMemberDetailsByContact
Description	Get the Membership details for the Contact
Parameters	<p>Integer <i>ContactIdentifier</i></p> <p>The unique identifier of the Contact.</p>
Returns	<p>Array of <MembershipMemberInfo></p> <p>The returned result of the Membership Member list.</p>

5.14.20 GetMemberDetailsByContactAndPackage

Operation	GetMemberDetailsByContactAndPackage
Description	Get the Membership details for the Contact
Parameters	Integer <i>ContactIdentifier</i> The unique identifier of the Contact.
	Integer <i>PackageIdentifier</i> The unique identifier of the Membership Packages.
Returns	Array of < MembershipMemberInfo > The returned result of the Membership Member list.

5.14.21 GetMemberDetailsByIdentifier

Operation	GetMemberDetailsByIdentifier
Description	Get the Membership information by identifier
Parameters	Integer <i>MemberIdentifier</i> The unique identifier of the Membership Member.
Returns	MembershipMemberInfo The returned result of the Membership Member information details.

5.14.22 GetMemberDetailsByOrganisation

Operation	GetMemberDetailsByOrganisation
Description	Get the Membership details for the Organisation
Parameters	Integer <i>OrganisationIdentifier</i> The unique identifier of the Organisation.
Returns	Array of < MembershipMemberInfo > The returned result of the Membership Member list.

5.14.23 GetMemberDetailsByOrganisationAndPackage

Operation	GetMemberDetailsByOrganisationAndPackage
Description	Get the Membership details for the Organisation
Parameters	Integer <i>OrganisationIdentifier</i> The unique identifier of the Contact.
	Integer <i>PackageIdentifier</i> The unique identifier of the Membership Packages.
Returns	Array of < MembershipMemberInfo > The returned result of the Membership Member list.

5.14.24 GetMemberDetailsByPackage

Operation	GetMemberDetailsByPackage
Description	Get the Membership details for the Membership Package
Parameters	Integer <i>PackageIdentifier</i> The unique identifier of the Organisation.
Returns	Array of < MembershipMemberInfo > The returned result of the Membership Member list.

5.14.25 GetPaymentDetailsByContact

Operation	GetPaymentDetailsByContact
Description	Get the Membership Payment details for the Contact
Parameters	Integer <i>ContactIdentifier</i> The unique identifier of the Contact.
Returns	Array of < MemberPaymentInfo > The returned result of the Membership Member Payment list.

5.14.26 GetPaymentDetailsByContactAndPackage

Operation	GetPaymentDetailsByContactAndPackage
Description	Get the Membership Payment details for the Contact
Parameters	<u>Integer</u> <i>ContactIdentifier</i> The unique identifier of the Contact.
	<u>Integer</u> <i>PackageIdentifier</i> The unique identifier of the Membership Packages.
Returns	Array of < <u>MemberPaymentInfo</u> > The returned result of the Membership Member Payment list.

5.14.27 GetPaymentDetailsById

Operation	GetPaymentDetailsById
Description	Get the Membership Payment detail by Payment identifier
Parameters	<u>Integer</u> <i>PaymentIdentifier</i> The unique identifier of the Membership Payment.
Returns	<u>MemberPaymentInfo</u> The returned result of the Membership Member Payment information.

5.14.28 GetPaymentDetailsByMember

Operation	GetPaymentDetailsByMember
Description	Get the Membership Payment details by Membership Member identifier
Parameters	<u>Integer</u> <i>MemberIdentifier</i> The unique identifier of the Membership Member.
Returns	Array of < <u>MemberPaymentInfo</u> > The returned result of the Membership Member Payment list.

5.14.29 GetPaymentDetailsByOrganisation

Operation	GetPaymentDetailsByOrganisation
Description	Get the Membership Payment details for the Organisation
Parameters	Integer <i>OrganisationIdentifier</i> The unique identifier of the Organisation.
Returns	Array of < MemberPaymentInfo > The returned result of the Membership Member Payment list.

5.14.30 GetPaymentDetailsByOrganisationAndPackage

Operation	GetPaymentDetailsByOrganisationAndPackage
Description	Get the Membership Payment details for the Organisation
Parameters	Integer <i>OrganisationIdentifier</i> The unique identifier of the Organisation.
	Integer <i>PackageIdentifier</i> The unique identifier of the Membership Packages.
Returns	Array of < MemberPaymentInfo > The returned result of the Membership Member Payment list.

5.15 DataManager

The Data Manager Web Service provides the facility to retrieve the information such as categorisation and Custom Fields from the system by providing either the System Entity Identifier or Custom Field Identifier

The list of Web Service methods for Data Manager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/DataManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The DataManager Web Service uses a web service data model called DynamicDataSearchField which is described below:

5.15.1 DynamicDataSearchField

The DynamicDataSearchField provides the information that forms the structure of the Dynamic Search Field item. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Field Identifier	Integer	The unique identifier of the Custom Field item by ChilliDB system	
Field Value	Object	The value of the Custom Field that will be used in search Custom Field data	

In term of the operation support, the Data Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Data Manager Web Service

Method Signature	Return	Description
GetTypesByEntity(Integer, SelectExpired)	Array of ReferenceDataItem	Get the reference data items about the System Entity's Type.
GetCategoriesByEntity(Integer, Integer,	Array of	Get the reference data

SelectExpired)	< ReferenceDataItem >	items about the System Entity's Category.
GetSubCategoriesByEntity (Integer, Integer, SelectExpired)	Array of < ReferenceDataItem >	Get the reference data items about the System Entity's Sub Category.
GetFileByIdentifier (Integer)	FileAttachmentItem	Get the available information of the file
GetCustomFieldsByEntity (Integer)	Array Of < DynamicDataField >	Get all Custom Fields fields definition for a Dynamic Field Entity
GetCustomFieldDataByEntity (Integer, Integer)	Array Of < DynamicDataSection >	Get all Custom Fields fields and values linked to System Field Entity (Retrieved by Custom Fields Entity Identifier and Entity Identifier, i.e. Contact Identifier)
GetCustomFieldDataByEntityIDs (Integer, String)	Array Of < DynamicDataSection >	Get all Custom Fields fields and values linked to System Field Entities (Retrieved by Custom Fields Entity Identifier and Entity Identifiers, i.e. Contact Identifiers)
GetBaseAndDynamicDataFieldsByEntity (Integer, Integer)	Array Of < DynamicDataField >	Get all Custom and Base Fields fields record (Retrieved by Custom Field Entity and Type). Base Fields are those Entity's built-in fields in ChilliDB. i.e. For Notes entity, these are the Title, Date and Details.
GetDynamicDataSectionsByEntity (Integer, Integer)	Array Of < DynamicDataSection >	Get all Custom Fields Sections (Retrieved by Custom Field Entity and Type).
SaveDynamicData (Integer, Array of < DynamicDataField >)	Boolean	Save dynamic field values for an Entity item. An Entity can be an Organisation, Contact, Note or any Custom Field Entity.

SearchDataForEntity (<i>Integer</i> , Array of < <i>String</i> >, Array of < <i>Integer</i> >, Array of < <i>DynamicDataSearchField</i> >)	DataSet	Get either the Contact or Organisation records based on the set of filters applied to Custom Field data. This method is only applicable when searching for Organisation and Contact records
GetCountryList()	Array of < ReferenceDataItem >	Get the reference data items about the Address Country
GetStateList()	Array of < ReferenceDataItem >	Get the reference data items about the Address State

5.15.2 GetTypesByEntity

Operation	GetTypesByEntity
Description	Get the reference data items about the System Entity's Type. i.e. Contact Type
Parameters	<p>Integer <i>SystemEntityId</i> The System Entity Identifier. This value can be retrieved by calling the System Core GetSystemEntities web service method</p> <p>SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.</p>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for System Entity Type. Please see the Web Service Data Model section for further information.</p>

5.15.3 GetCategoriesByEntity

Operation	GetCategoriesByEntity
Description	Get the reference data items about the System Entity's Category. i.e. Contact Category
Parameters	<p>Integer <i>SystemEntityId</i> The System Entity Identifier. This value can be retrieved by calling the</p>

	System Core GetSystemEntities web service method
	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the System Entity Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for System Entity Type. Please see the Web Service Data Model section for further information.

5.15.4 GetSubCategoriesByEntity

Operation	GetSubCategoriesByEntity
Description	Get the reference data items about the System Entity's Sub Category. i.e. Contact Sub Category
Parameters	Integer <i>SystemEntityId</i> The System Entity Identifier. This value can be retrieved by calling the System Core GetSystemEntities web service method
	Integer <i>CategoryIdentifier</i> The Category identifier which is used to filter the System Entity Sub Category items which has the specified Category identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for System Entity Type. Please see the Web Service Data Model section for further information.

5.15.5 GetFileByIdentifier

Operation	GetFileByIdentifier
Description	Get the available information of the file
Parameters	Integer <i>FileIdentifier</i> The identifier of an existing File record.
Returns	FileAttachmentItem

	Please see the Web Service Data Model section for further information.
--	--

5.15.6 GetCustomFieldsByEntity

Operation	GetCustomFieldsByEntity
Description	Get all Custom Fields fields record (Retrieved by Dynamic Field Entity)
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by calling the System Core GetCustomFieldEntities web service method.
Returns	Array of < DynamicDataField > The returned result of the Custom Fields section field.

5.15.7 GetCustomFieldDataByEntity

Operation	GetCustomFieldDataByEntity
Description	Get all Custom Fields fields and values linked to an System Entity item (Retrieved by Dynamic Field Entity and System Entity Identifier i.e. Contact Identifier)
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by calling the System Core GetCustomFieldEntities web service method.
	Integer <i>RecordIdentifier</i> The identifier of an existing System Entity record. I.e. Contact Identifier
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.15.8 GetCustomFieldDataByEntityIDs

Operation	GetCustomFieldDataByEntityIDs
Description	Get all Custom Fields fields and values linked to System Field Entities (Retrieved by Custom Fields Entity Identifier and Entity Identifiers, i.e. Contact Identifiers)
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by

	calling the System Core GetCustomFieldEntities web service method.
	String <i>RecordIdentifiers</i> A comma-separated-value of identifiers for existing System Entity records. I.e. Contact Identifiers
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.15.9 GetBaseAndDynamicDataFieldsByEntity

Operation	GetBaseAndDynamicDataFieldsByEntity
Description	Get all Custom and Base Fields fields record (Retrieved by Custom Field Entity and Type). Base Fields are those Entity's built-in fields in ChilliDB. i.e. For Notes entity, these are the Title, Date and Details.
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by calling the System Core GetCustomFieldEntities web service method.
	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array Of < DynamicDataField > The returned result of the Custom Fields section fields.

5.15.10 GetDynamicDataSectionsByEntity

Operation	GetDynamicDataSectionsByEntity
Description	Get all Custom Fields Sections (Retrieved by Custom Field Entity and Type).
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by calling the System Core GetCustomFieldEntities web service method.
	Integer <i>TypeIdentifier</i> The identifier of the dynamic field data type.
Returns	Array of < DynamicDataSection > The returned result of the Custom Fields field section.

5.15.11 SaveDynamicData

Operation	SaveDynamicData
Description	Save dynamic field values for an Entity item. An Entity can be an Organisation, Contact, Note or any Custom Field Entity.
Parameters	Integer <i>RecordIdentifier</i> The identifier of an existing System Entity record. I.e. Contact Identifier
	Array of DynamicDataField <i>DynamicDataFieldValues</i> A collection of dynamic Custom Fields fields and values
Returns	Boolean A value of <i>true</i> means the Custom Fields values were successfully saved for an record item; otherwise, <i>false</i>

5.15.12 SearchDataForEntity

Operation	SearchDataForEntity
Description	Get either the Contact or Organisation records based on the set of filters applied to Custom Field data. This method is only applicable when searching for Organisation and Contact records
Parameters	Integer <i>CustomFieldEntityIdentifier</i> The identifier of the Custom Fields entity. This information can be retrieve by calling the System Core GetCustomFieldEntities web service method.
	Array of String <i>SearchKeywords</i> The name keyword to be searched
	Array of Integer <i>CustomFieldIdentifiersDataToReturn</i> The list of Identifiers of Custom Fields data the method needs to return in addition to the base Contact or Organisation data.
	Array of DynamicDataSearchField <i>CustomFieldSearchFieldIdentifiers</i> A collection of dynamic Custom Fields field and value combination to be used as filters for searching records
Returns	Dataset A dataset including the Contact or Organisation data including custom field data for the provided parameter <i>CustomFieldIdentifiersDataToReturn</i> .

5.15.13 GetCountryList

Operation	GetCountryList
Description	Get the reference data items about the Address Country
Parameters	<none>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Address Country. Please see the Web Service Data Model section for further information.</p>

5.15.14 GetStateList

Operation	GetStateList
Description	Get the reference data items about the Address State
Parameters	<none>
Returns	<p>Array of <ReferenceDataItem></p> <p>The reference data items for Address State. Please see the Web Service Data Model section for further information.</p>

5.16 DocumentRegisterManager

The Document Register Manager Web Service provides the facility to retrieve Document Register data which consists of name, number, status, description, and also the Documents and Notes that are linked to the Document Register.

The list of Web Service methods for Data Manager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/DocumentRegisterManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The DocumentRegisterManager Web Service uses a number of Web Service Data Models including the NoteInfo and FileAttachmentItem in its operation. However, this Web Service has a data model that is mainly used within its domain. This data model is described below:

5.16.1 DocumentInfo

The DocumentInfo provides the information that forms the structure of the Document record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Document item by ChilliDB system	
Name	String (250)	The name of the Document	
Number	String (50)	The number associated to the Document.	This can be a system supplied or user defined value depending on the Document Register Configuration settings specified in ChilliDB.
Type	ReferenceDataItem	Represents the Document	

		Type information	
Category	ReferenceDataItem	Represents the Document Category information	
Sub Category	ReferenceDataItem	Represents the Document Sub Category information	
Description	String (4000)	The description of the Document	
Status	ReferenceDataItem	The status of the Document.	
Date Commenced	DateTime	The date the Document commenced.	This field is only applicable to Document Register of type Policies & Key Docs – Internal or Policies & Key Docs - External.
Date Endorsed	DateTime	The date the Document was endorsed.	This field is only applicable to Document Register of type Document Register of type Policies & Key Docs – Internal or Policies & Key Docs - External.
Last Reviewed Date	DateTime	The date the Document was last reviewed.	This field is only applicable to Document Register of type Document Register of type Policies & Key Docs – Internal or Policies & Key Docs - External.
Next Review Date	DateTime	The date the Document will be reviewed next.	This field is only applicable to Document Register of type Document Register of type Policies & Key Docs – Internal or Policies & Key

			Docs - External.
Lead Staff Member Contact Identifier	Integer	The unique identifier of the Contact assigned as Lead Staff Member for the Document.	This field is only applicable to Document Register of type Document Register of type Policies & Key Docs – Internal or Policies & Key Docs - External.
Lead Staff Member Full Name	String	The name of the Contact assigned as Lead Staff Member for the Document.	This field is only applicable to Document Register of type Document Register of type Policies & Key Docs – Internal or Policies & Key Docs - External.
Categorisation	String	The Categorisation description of the Document.	
Organisation Id	Integer	The unique identifier of the Organisation linked to the Document	This field is only applicable to Document Register of type Policies & Key Docs - External.
Organisation Display Name	String	The name of the Organisation linked to the Document	This field is only applicable to Document Register of type Policies & Key Docs - External.
Date Received	DateTime	The date the document was received.	This field is only applicable to all Document Register except Document Register of type Policies & Key Docs – Internal.
Feedback Date	DateTime	The feedback date for the Document	This field is only applicable to

			Document Register of type Policies & Key Docs - External.
Action Taken	String	Describes the steps, actions, procedures taken against the Document item	This field is only applicable to Document Register of type Policies & Key Docs - External.
Files	Array of FileAttachmentItem	Get the list of Files attached to the Document	
Created By User Id	Integer	The system user identifier indicating the creator of the record	
Created By User Name	String	The system user name indicating the creator of the record	
Created Date	DateTime	The system date and time saved when the record was created	
Modified By	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	

In term of the operation support, the Document Register Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Document Register Manager Web Service

Method Signature	Return	Description
GetDocument(Integer)	DocumentInfo	Get the information about the Document such as Name, Number, Type
GetDocumentFileAttachments(Integer)	Array of < FileAttachmentItem >	Get the available information of the files linked to the Document
GetDocumentNotes(Integer)	Array of < NoteInfo >	Get the available information of the notes linked to the Document
GetDocumentsByKeywords (Array of < String >, ExpireStatus)	Array of < DocumentInfo >	Get one or more Document records based on a set of filters applied to the Document name, number and expiry status

5.16.2 GetDocument

Operation	GetDocument
Description	Get the information about the Document such as Name, Number, Type
Parameters	Integer <i>DocumentIdentifier</i> The Document Identifier
Returns	DocumentInfo The returned result of the Document information details.

5.16.3 GetDocumentFileAttachments

Operation	GetDocumentFileAttachments
Description	Get the available information of the files linked to the Document
Parameters	Integer <i>PolicyIdentifier</i> The Document Identifier

Returns	Array of < FileAttachmentItem > The returned result of the Document file attachments list.
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5.16.4 GetDocumentNotes

Operation	GetDocumentNotes
Description	Get the available information of the notes linked to the Document
Parameters	Integer <i>DocumentIdentifier</i> The Document Identifier
Returns	Array of < NoteInfo > The returned result of the Document notes list.

5.16.5 GetDocumentsByKeywords

Operation	GetDocumentsByKeywords
Description	Get one or more Document records based on a set of filters applied to the Document name, number and expiry status
Parameters	Array of < String > <i>DocumentNameKeywords</i> The name and number keywords to be searched.
	ExpireStatus <i>enuExpired</i> The expiry status of the Document record
Returns	Array of < DocumentInfo > The returned result of the Document details.

5.17 DonationsManager

The Donations Manager Web Service provides the facility to retrieve Donations data which consists of donor, date, receipt number, donation method, and description.

The list of Web Service methods for Data Manager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/DonationsManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The DonationsManager Web Service has a data model that is mainly used within its domain. This data model is described below:

5.17.1 DonationInfo

The DonationInfo provides the information that forms the structure of the Donation record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Donation item by ChilliDB system	
Type	ReferenceDataItem	Represents the Donation Type information	This is required field
Category	ReferenceDataItem	Represents the Donation Category information	
Sub Category	ReferenceDataItem	Represents the Donation Sub Category information	
Organisation Identifier	Integer	The unique identifier of the Organisation who made the donation	This is required field
Contact Identifier	Integer	The unique identifier of the Contact who made the donation	
Donation Date	DateTime	The date the Donation was made	This is required field

Amount	Decimal	The amount of Donation	
Description	String (2500)	The description of the Donation	
Receipt Number	String (100)	The receipt number of the Donation	
Donation Method	ReferenceDataItem	Determines how the donation was made	
Created By User Id	Integer	The system user identifier indicating the creator of the record	
Created By User Name	String	The system user name indicating the creator of the record	
Created Date	DateTime	The system date and time saved when the record was created	
Modified By	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	

In term of the operation support, the Donations Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Donations Manager Web Service

Method Signature	Return	Description
GetDonationByIdentifier (Integer)	DonationInfo	Get the information about the Donations such as Contact Identifier, Organisation Identifier, Date,

		Amount, Donation Method
GetDonationMethod (SelectExpired , Boolean)	Array of <ReferenceDataItem>	Get the reference data items about the Donation Methods
SaveDonation(DonationInfo)	Integer	Save the Donation details.
GetDonationsByKeywords (Array of <String> , SelectExpired)	Array of <DonationInfo>	Get one or more Donation records based on a set of filters applied to the Contact name, Organisation name, Donation description, number and expiry status

5.17.2 GetDonationByIdentifier

Operation	GetDonationByIdentifier
Description	Get the information about the Donations such as Contact Identifier, Organisation Identifier, Date, Amount, Donation Method
Parameters	Integer <i>DonationIdentifier</i> The Document Identifier
Returns	DonationInfo The returned result of the Donation information details.

5.17.3 GetDonationMethod

Operation	GetDonationMethod
Description	Get the reference data items about the Donation Methods
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
	Boolean <i>SelectInUseOnly</i> The option to filter the reference data that are currently in use
Returns	Array of <ReferenceDataItem> The reference data items for Donation Method. Please see the Web Service Data Model section for further information.

5.17.4 SaveDonation

Operation	SaveDonation
Description	Save the Donation details.
Parameters	DonationInfo <i>DonationInfo</i> The Donation information to be saved into the system.
Returns	Integer The system identifier allocated to the Donation record.

5.17.5 GetDonationsByKeywords

Operation	GetDonationsByKeywords
Description	Get one or more Donation records based on a set of filters applied to the Contact name, Organisation name, Donation description, number and expiry status
Parameters	Array of < String > <i>DonationKeywords</i> The name and number keywords to be searched.
	SelectExpired <i>SelectExpired</i> The expiry status of the Donation record
Returns	Array of < DonationInfo > The returned result of the Donations details.

5.18 GroupManager

The Group Manager Web Service provides the facility to retrieve Group data which consists of name and description.

The list of Web Service methods for Group Manager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/GroupManager.aspx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The GroupManager Web Service has data models that are mainly used within its domain. These data models are described below:

5.18.1 GroupInfo

The GroupInfo provides the information that forms the structure of the Group record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Group item by ChilliDB system	
Type	ReferenceDataItem	Represents the Group Type information	This is a required field
Category	ReferenceDataItem	Represents the Group Category information	
Sub Category	ReferenceDataItem	Represents the Group Sub Category information	
Name	String (150)	The name of the group	This is a required field
Description	String (500)	The description of the Group	
Entity Type	SystemEntityTypeEnum	Determines whether the Group is for Contacts or Organisations	
Member Count	Integer	The number of Group	

		members	
Group Fields	Array of String	The list of Contact or Organisation field names that will be displayed/exposed by the Group	
Is Maintaining Distribution List	Boolean	Determines if the Group is linked to a Distribution List	
Maintained Distribution List Identifier	Integer	The unique identifier of the Distribution List linked to the Group	
Maintained Distribution List Name	String	The name of the Distribution List linked to the Group	
Created By User Id	Integer	The system user identifier indicating the creator of the record	
Created By User Name	String	The system user name indicating the creator of the record	
Created Date	DateTime	The system date and time saved when the record was created	
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	

5.18.2 GroupMemberInfo

The GroupMemberInfo provides the information that forms the structure of the Group Member record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Group Member item by ChilliDB system	
Group Identifier	Integer	The unique identifier of the Group the Member is associated to	This is a required field
Entity Identifier	Integer	The unique identifier of the Contact or Organisation member of the Group	This is a required field
Entity Full Nmae	String	The name of the Contact or Organisation member of the Group	
List Communication Item	CommunicationInfo	The Communication details of the Contact or Organisation	
Member Fields	Array of <GroupMemberFieldInfo>	List of Contact or Organisation fields and value	

5.18.3 GroupMemberFieldInfo

The GroupMemberFieldInfo provides the information that forms the structure of the Group Member Field record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Field Name	String	The name of the Contact or Organisation field	
Field Value	String	The value of the Contact or Organisation field	

In terms of the operation support, the Group Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Group Manager Web Service

Method Signature	Return	Description
GetTypes (SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Group Type.
GetCategories (Integer , SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Group Category.
GetSubCategories (Integer , SelectExpired)	Array of <ReferenceDataItem>	Get the reference data items about the Group Sub Category.
GetGroup (Integer)	GroupInfo	Get the information about the Group such as Name, Description and Entity Type
GetGroups ()	Array of <GroupInfo>	Get all Group records
SearchGroups (Array of <String>)	Array of <GroupInfo>	Get one or more Group records based on a set of filters applied Group name
GetGroupMember (Integer)	GroupMemberInfo	Get the details of a Group Member
GetGroupMembers (Integer)	Array of <GroupMemberInfo>	Get the details of all Group members
GetNumberOfGroups (Array of <String> , SelectExpired)	Array of <ReferenceDataItem>	Get the number of Groups based on a set of filters applied to the group name and expiry status.

5.18.4 GetTypes

Operation	GetTypes
Description	Get the reference data items about the Group Type.
Parameters	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of <ReferenceDataItem>

	The reference data items for Group Type. Please see the Web Service Data Model section for further information.
--	---

5.18.5 GetCategories

Operation	GetCategories
Description	Get the reference data items about the Group Category.
Parameters	Integer <i>TypeIdentifier</i> The Type identifier which is used to filter the Group Category items which has the specified Type identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Group Category. Please see the Web Service Data Model section for further information.

5.18.6 GetSubCategories

Operation	GetSubCategories
Description	Get the reference data items about the Group Sub Category.
Parameters	Integer <i>CategoryIdentifier</i> The Category identifier which is used to filter the Group Category items which has the specified Category identifier as the parent identifier.
	SelectExpired <i>SelectExpired</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Group Sub Category. Please see the Web Service Data Model section for further information.

5.18.7 GetGroup

Operation	GetGroup
Description	Get the information about the Group such as Name, Description and Entity Type
Parameters	Integer <i>GroupIdentifier</i>

	The Group Identifier
Returns	GroupInfo The returned result of the Group information details.

5.18.8 GetGroups

Operation	GetGroups
Description	Get all Group records
Parameters	<none>
Returns	Array of < GroupInfo > The returned result of the Groups details.

5.18.9 SearchGroups

Operation	SearchGroups
Description	Get one or more Group records based on a set of filters applied Group name
Parameters	Array of < String > <i>NameKeywords</i> The name keywords to be searched.
Returns	Array of < GroupInfo > The returned result of the Groups details.

5.18.10 GetGroupMember

Operation	GetGroupMember
Description	Get the details of a Group Member
Parameters	Integer <i>MemberIdentifier</i> The Group Member identifier
Returns	GroupMemberInfo The returned result of the Group Member details.

5.18.11 GetGroupMembers

Operation	GetGroupMembers
Description	Get the details of a Group Member
Parameters	Integer <i>GroupIdentifier</i> The Group identifier
Returns	Array of GroupMemberInfo > The returned result of the Group Members details.

5.18.12 GetNumberOfGroups

Operation	GetNumberOfGroups
Description	Get the number of Group records based on a set of filters applied Group name and expiry status
Parameters	Array of String <i>aryNameKeywords</i> The name keywords to be searched.
	SelectExpired <i>enuExpireStatus</i> The expiry status of the Group record
Returns	Integer The returned result of the number of Group records.

5.19 StaffTrackingManager

The Staff Tracking Manager Web Service provides the facility to retrieve Staff Tracking data which consists of username, contact identifier, user identifier.

The list of Web Service methods for Group Manager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/StaffTrackingManager.asmx

Notes:

- *XYZ is the name of your Web Server which hosts ChilliDB*
- *ChilliDB is the name of your ChilliDB web application share on your web server.*
 - *Default value is ChilliDB for clients hosting their own ChilliDB.*
 - *Some older systems may still use DIS instead of ChilliDB*
 - *Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.*

The StaffTrackingManager Web Service has data models that are mainly used within its domain. These data models are described below:

5.19.1 StaffTrackingInfo

The StaffTrackingInfo provides the information that forms the structure of the Staff Tracking record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Group item by ChilliDB system	
User Identifier	Integer	The unique identifier of the system user	
Username	String	The username of the system user	
User Contact Identifier	Integer	The unique identifier of the Contact linked to the system user	
User Contact Full Name	String	The name of the Contact linked to the system user	
Start Date	Date	The start date of the activity	
End Date	Date	The end date of the activity	
Status Identifier	Integer	The unique Identifier	Status Identifier value is either

		representing Staff Status	In (1), Out (2) or Unavailable (3)
Status	String	The description representing the Staff Status	
Activity Identifier	Boolean	The unique identifier representing the Staff Activity	
Activity Comments	Integer	The description representing the Staff Activity	

5.19.2 StaffTrackingJsonResult

The StaffTrackingJsonResult provides the information that forms the structure of the Staff Tracking record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Group item by ChilliDB system	
User Identifier	Integer	The unique identifier of the system user	
Username	String	The username of the system user	
User Contact Identifier	Integer	The unique identifier of the Contact linked to the system user	
User Contact Full Name	String	The name of the Contact linked to the system user	
Start Date	Date	The start date of the activity	
End Date	Date	The end date of the activity	
Status Identifier	Integer	The unique Identifier representing Staff Status	Status Identifier value is either In (1), Out (2) or Unavailable (3)
Status	String	The description representing	

		the Staff Status	
Activity Identifier	Boolean	The unique identifier representing the Staff Activity	
Activity Comments	Integer	The description representing the Staff Activity	

In terms of the operation support, the Staff Tracking Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

Web Methods Listing for Group Manager Web Service

Method Signature	Return	Description
DeleteStaffTrackingByIdentifier(Integer)	<none>	Delete Staff Tracking record by Staff Tracking identifier
GetCurrentStaffList(Boolean)	Array of < UserInfo >	Get a list of system users based on the filter applied of whether to get all system users or only those available in the Staff Tracking list.
GetCurrentTrackingStatusForAllUsers()	Array of < StaffTrackingInfo >	Get a list of all active / in progress Staff Tracking details
GetCurrentTrackingStatusForAllUsers2()	Array of < StaffTrackingJsonResult >	Get a list of all active / in progress Staff Tracking details
GetStaffTrackingActivities(Boolean)	Array of < ReferenceDataItem >	Get the reference data items about the Staff Tracking Activities.
GetStaffTrackingItemByIdentifier(Integer, Integer)	StaffTrackingInfo	Get the information about a Staff Tracking record
GetStaffTrackingItemsByUserIdentifer(Integer, DateTime, DateTime)	Array of < StaffTrackingInfo >	Get one or more Staff Tracking records based on a set of filters applied to the user and activity dates.

InsertStaffTracking(StaffTrackingInfo)	Integer	Save the new Staff Tracking record.
UpdateStaffTracking(StaffTrackingInfo)	<none>	Update the details of an existing Staff Tracking record.

5.19.3 DeleteStaffTrackingByIdentifier

Operation	DeleteStaffTrackingByIdentifier
Description	Delete Staff Tracking record by Staff Tracking identifier
Parameters	Integer <i>intStaffTrackingIdentifier</i> The Staff Tracking record identifier.
Returns	<none>

5.19.4 GetCurrentStaffList

Operation	GetCurrentStaffList
Description	Get a list of system users information based on the filter applied of whether to get all system users or only those available in the Staff Tracking list.
Parameters	Boolean <i>blnShowOnlyUsersInStaffTrackingList</i> Determines whether to get information of all system users or only those available in the Staff Tracking list.
Returns	Array of < UserInfo > The returned result of the Users details.

5.19.5 GetCurrentTrackingStatusForAllUsers

Operation	GetCurrentTrackingStatusForAllUsers
Description	Get a list of all active / in progress Staff Tracking details
Parameters	<none>
Returns	Array of < StaffTrackingInfo > The returned result of the Staff Tracking details.

5.19.6 GetCurrentTrackingStatusForAllUsers2

Operation	GetCurrentTrackingStatusForAllUsers2
Description	Get a list of all active / in progress Staff Tracking details
Parameters	<none>
Returns	Array of < StaffTrackingInfo > The returned result of the Staff Tracking details.

5.19.7 GetStaffTrackingActivities

Operation	GetStaffTrackingActivities
Description	Get the reference data items about the Staff Tracking Activities.
Parameters	Boolean <i>blnInUseOnly</i> Determines whether to get information of all Staff Tracking Activities or only those that have been used.
Returns	Array of < ReferenceDataItem > The reference data items for Group Sub Category. Please see the Web Service Data Model section for further information.

5.19.8 GetStaffTrackingItemByIdentifier

Operation	GetStaffTrackingItemByIdentifier
Description	Get the information about a Staff Tracking record
Parameters	Integer <i>intIdentifier</i> The Staff Tracking record identifier
	Integer <i>intUserId</i> The System User record identifier
Returns	StaffTrackingInfo The returned result of the Staff Tracking details.

5.19.9 GetStaffTrackingItemsByUserIdentifier

Operation	GetStaffTrackingItemsByUserIdentifier
Description	Get one or more Staff Tracking records based on a set of filters applied to the user and activity dates.
Parameters	Integer <i>intUserId</i> The System User record identifier
	DateTime <i>dteStartDate</i> The Staff Tracking Activity's start date.
	DateTime <i>dteEndDate</i> The Staff Tracking Activity's end date.
Returns	Array of < StaffTrackingInfo > The returned result of the Staff Tracking details.

5.19.10 InsertStaffTracking

Operation	InsertStaffTracking
Description	Save the new Staff Tracking record.
Parameters	StaffTrackingInfo <i>objStaffTracking</i> The Staff Tracking details to be saved
Returns	Integer The returned result of the Staff Tracking unique identifier.

5.19.11 UpdateStaffTracking

Operation	UpdateStaffTracking
Description	Update the details of an existing Staff Tracking record..
Parameters	StaffTrackingInfo <i>objStaffTracking</i> The Staff Tracking details to be saved
Returns	<none>

5.20 ClientAdministrationManager

The Client Administration Manager Web Service provides the facility to retrieve Client data including the Mail/Physical Addresses, Phone Numbers, Fax Numbers, Email Addresses, and also Custom Fields values.

The list of Web Service methods for ContactManager can be accessed from the following URL:

http://XYZ/ChilliDB/MODULES/CRM_Integration_Services/DataExchange/ClientAdministrationManager.asmx

Notes:

- XYZ is the name of your Web Server which hosts ChilliDB
- ChilliDB is the name of your ChilliDB web application share on your web server.
 - Default value is ChilliDB for clients hosting their own ChilliDB.
 - Some older systems may still use DIS instead of ChilliDB
 - Clients who host their system with Polymorphic Solutions would have an arbitrary abbreviation which identifies their Organisation, for example, ACME if your company were called ACME Pty Ltd. This value can be determined from the URL you use to log into your ChilliDB.

The ClientAdministrationManager Web Service uses a number of Web Service Data Models including the ReferenceDataItem in its operation. However, this Web Service has a data model that is mainly used within its domain, which is the ContactInfo.

5.20.1 ClientInfo

The ClientInfo provides the information that forms the structure of the Client record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Client assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Client Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Client Category information	
Sub Category	ReferenceDataItem	Represents the Client Sub Category information	
Client Key	String ()	The Client Key	The value is mandatory
Name Title	ReferenceDataItem	Represents the Client Name Title information	
First Names	String (25)	The Client first names	The value is

			mandatory
Last Name	String (25)	The Client last name	
Preferred Names	String (100)	The Contact preferred names	
Client Full Name	String	The Client full name including the name title.	When performing an insert/update, this value is not required
Date of Birth	DateTime	The Client date of birth	
Gender	ReferenceDataItem	The Client gender information	
General Practitioner	ContactInfo	The Client's General Practitioner	
Service Coordinator	ContactInfo	The Client's Service Coordinator	
General Practice	OrganisationItem	The Client's General Practice	
Randomisation Group	ReferenceDataItem	The Client's Randomisation Group	
Marital Status	ReferenceDataItem	The Client's marital status	
Employment Status	ReferenceDataItem	The Client's employment status	
Country of Birth	ReferenceDataItem	The Client's country of birth	
Indigenous Status	ReferenceDataItem	The Client's indigenous status	
Main Language Spoken	ReferenceDataItem	The Client's main language	
English Proficiency	ReferenceDataItem	The Client's English proficiency	
Living Arrangements	ReferenceDataItem	The Client's living arrangement	
Business Email	String (100)	The Client business email address	When performing an insert/update, this value is not required. In order to store an email address against the Client, use the

			SaveCommunication web method.
Business Phone	String (100)	The Client business phone number	When performing an insert/update, this value is not required. In order to store a phone number against the Client, use the SaveCommunication web method.
Business Mobile	String (100)	The Client business mobile number	When performing an insert/update, this value is not required. In order to store a mobile phone number against the Client, use the SaveCommunication web method.
Business Fax	String (100)	The Client business fax number	When performing an insert/update, this value is not required. In order to store an fax number against the Client, use the SaveCommunication web method.
Personal Email	String (100)	The Client personal email address	When performing an insert/update, this value is not required. In order to store an email address against the Client, use the SaveCommunication web method.
Personal Phone	String (100)	The Client personal phone number	When performing an insert/update, this value is not required. In order to store a phone number against the Client, use the SaveCommunication web method.

Personal Mobile	String (100)	The Client personal mobile number	When performing an insert/update, this value is not required. In order to store a mobile phone number against the Client, use the SaveCommunication web method.
Personal Fax	String (100)	The Client personal fax number	When performing an insert/update, this value is not required. In order to store an fax number against the Client, use the SaveCommunication web method.
Address Details	Array of AddressInfo	One or more Client Addresses including inherited Business Physical and Mail Address	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	
Expired	DateTime	The date and time when the record is expired.	When performing an insert/update, this value is not required.

5.20.2 ClientNoteInfo

The ClientNoteInfo provides the information that forms the structure of the Client Note record. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Client Note assigned by ChilliDB system	
Type	ReferenceDataItem	Represents the Client Note Type information	The value is mandatory
Category	ReferenceDataItem	Represents the Client Note Category information	
Sub Category	ReferenceDataItem	Represents the Client Note Sub Category information	
Title	String (255)	The Client Note title	The value is mandatory
Plain Text	String	The plain text format of the Client Note description	
Text	String	The HTML text format of the Client Note description	
Status	Char	The Client Note status. The value can be Open (O) or Closed (C)	The value is mandatory
Date	DateTime	The date set on the Client Note by the user	The value is mandatory
Follow Up Date	DateTime	The follow up date set on the Client Note by the user. If the follow up date is set, then the Client Note Status is set to Open otherwise it is set to Closed.	
Is Sensitive	Boolean	The status to determine if the Client Note record is sensitive to be viewed by certain users or roles linked to the users.	When performing an insert/update, this value is not required

Associations	Array of < ClientNoteAssociation >	The Client, Contact and Organisation associations with the Client Note record.	
Message Identifier	String (900)	The global unique identifier that distinguish different email messages.	The < and > characters need to be included when inserting/updating the email message as a Note item.
Case Identifier	Integer	The unique identifier of the Case linked to the Client Note record	
Case Activity Identifier	Integer	The unique identifier of the Case Activity linked to the Client Note record	
Created By User Id	Integer	The system user identifier indicating the creator of the record	The value is mandatory
Created By User Name	String	The system user name indicating the creator of the record	When performing an insert/update, this value is not required
Created Date	DateTime	The system date and time saved when the record was created	The value is mandatory
Modified By User Id	Integer	The system user identifier indicating the last modifier of the record	
Modified By User Name	String	The system user name indicating the last modified of the record	When performing an insert/update, this value is not required
Modified Date	DateTime	The system date and time saved when the record was last modified	

5.20.3 ClientNoteAssociation

The ClientNoteAssociation provides the information that forms the structure of the associated data between Client Note, Client, Contact, and Organisation records. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Identifier	Integer	The unique identifier of the Client Note Association item assigned by ChilliDB system	
Contact Identifier	Integer	The identifier of the Contact	
Organisation Identifier	Integer	The identifier of the Organisation	
Client Identifier	Integer	The identifier of the Client	
Contact	ContactInfo	The Contact details	
Organisation	OrganisationInfo	The Organisation details	
Client Description	String	The Client Admin Client full name	
Text	String	The text representation of the Client or Contact and Organisation name combination.	
Interaction	ReferenceDataItem	Represents the Client Note Interaction Method information	The value is mandatory
Communication Value	String	Represents the Communication value used against Client Note	

5.20.4 ClientTypeClientKeyInfo

The *ClientTypeClientKeyInfo* provides the information about the configuration settings linked to a Client Type Client Key. The model exhibits the following information through the web services.

Name	Data Type	Description	Additional Rules
Type Id	Integer	The Client Type identifier	
Type Description	String	The Client Type description	
Identifier	Integer	The Client Key record identifier	
Client Key Format Id	Integer	<p>The identifier linked to the Client Key Format.</p> <p>The value can be one of the following:</p> <p>1 – System Generated</p> <p>In this format the reference number will be automatically generated by the system.</p> <p>2 – User Supplied</p> <p>In this format the reference number will be supplied by the user.</p>	<p>When reference number format is system generated, any prefix or suffix defined for the Client Key from the Client Type will be appended automatically when the Client is inserted.</p> <p>When the reference number format is user supplied, any value entered by the user will become the value of the reference number.</p>
Client Key Format Description	String	The description linked to the Client Key Format.	
Client Key Suffix	String (1000)	The suffix value to be appended to the client key.	
Client Key Prefix	String (1000)	The prefix value to be appended to the client key.	
Client Key Default Value	String (1000)	The default value which will be assigned as a client key when there is no number supplied by the user.	<p>If a prefix/suffix is specified, then the default value will contain the prefix/suffix value.</p> <p>The default value can contain both prefix and suffix when they are both defined in the configuration settings for the Client</p>

			Type.
Client Padding Length	Integer	The prefix value to be appended to the client key.	

In term of the operation support, the Client Administration Manager Web Service also provides the following web methods where the client can interface to perform a number of operations.

GetNumberOfClients (String , Array of <String> , ExpireStatus)	Integer	Get the number of Client records based on a set of filters applied to the Client key, name and expiry status
SearchClients (String , Array of <String> , ExpireStatus)	Array of <ClientInfo>	Get one or more Client records based on a set of filters applied to the Client key, name and expiry status
FindClientCommunication (String , SelectExpired)	Array of <CommunicationInfo>	Get one or more Client communication records based on Client communication value and expiry status
GetClient (Integer)	ClientInfo	Get information about one Client such as the Client names, title, gender, status, and date of birth
GetClientByClientKey (String)	ClientInfo	Get information about one Client such as the Client names, title, gender, status, and date of birth
SaveClient (ClientInfo)	Integer	Save the Client information
SaveCommunication (Integer , CommunicationInfo , Boolean)	<none>	Save the Client communication record
SaveAddress (Integer , AddressInfo)	<none>	Save the Client address information
SaveClientNote (ClientNoteInfo)	Integer	Save the Client note information
AttachFileToClientNote (Integer , String , String , Base64Binary)	<none>	Attach file into a Client note record
GetClientKeySettingsByClientType (Integer)	ClientTypeClientKeyInfo	Get the Client key settings by Client Type
GetClientTypesWithClientKeySettings (SelectExpired)	Array of <ClientTypeClientKeyInfo>	Get one or more Client Types with Client Key settings
GetClientGenderList (Boolean , SelectExpired)	Array of <ReferenceDataItem>	Get one or more Gender information

5.20.5 GetNumberOfClients

Operation	GetNumberOfClients
Description	Get the number of Client records based on a set of filters applied to the Client key, name and expiry status
Parameters	<p>String <i>ClientKey</i> The Client Key of a client record</p> <p>Array of String <i>ClientNameKeywords</i> The name keywords to be searched. The system implements a restrictive search where the keywords will restrict the number of Client records being returned by the system.</p> <p>ExpireStatus <i>ExpireStatus</i> The expiry status of the Client record</p>
Returns	<p>Integer The returned result of the Client details count.</p>

5.20.6 SearchClients

Operation	SearchClients
Description	Get one or more Client records based on a set of filters applied to the Client key, name and expiry status
Parameters	<p>String <i>ClientKey</i> The Client Key of a client record</p> <p>Array of String <i>ClientNameKeywords</i> The name keywords to be searched. The system implements a restrictive search where the keywords will restrict the number of Client records being returned by the system.</p> <p>ExpireStatus <i>ExpireStatus</i> The expiry status of the Client record</p>
Returns	<p>Array of ClientInfo The returned result of the client information details.</p>

5.20.7 FindClientCommunication

Operation	FindClientCommunication
Description	Get one or more Client communication records based on Client communication value and expiry status
Parameters	String <i>CommunicationValue</i> The client's communication detail
	SelectExpired <i>ExpireStatus</i> The option to filter the expired reference data.
Returns	Array of < CommunicationInfo > The returned result of the Communication item details.

5.20.8 GetClient

Operation	GetClient
Description	Get information about one Client such as the Client names, title, gender, status, and date of birth
Parameters	Integer <i>ClientIdentifier</i> The Client Identifier
Returns	ClientInfo The returned result of the Client information details.

5.20.9 GetClientByClientKey

Operation	GetClientByClientKey
Description	Get information about one Client such as the Client names, title, gender, status, and date of birth
Parameters	String <i>ClientKey</i> The Client Key
Returns	ClientInfo The returned result of the Client information details.

5.20.10 SaveClient

Operation	SaveClient
Description	Save the Client information
Parameters	ClientInfo <i>Client</i>
Returns	Integer The system identifier associated to the Contact record.

5.20.11 SaveCommunication

Operation	SaveCommunication
Description	Save the Client communication record
Parameters	Integer <i>ClientIdentifier</i> The Client identifier
	CommunicationInfo <i>ClientCommunication</i> The communication information to be saved
	Boolean <i>CommunicationIsPreferred</i>
Returns	<none>

5.20.12 SaveAddress

Operation	SaveAddress
Description	Save the Client address information
Parameters	Integer <i>ClientIdentifier</i> The Client identifier
	AddressInfo <i>ClientAddress</i> The Client address information.
Returns	<none>

5.20.13 SaveClientNote

Operation	SaveClientNote
Description	Save the Client note information
Parameters	ClientNoteInfo <i>ClientNote</i> The Client Note information to be saved
Returns	Integer The system identifier allocated to the new Client Note record or associated with an existing Client Note record.

5.20.14 AttachFileToClientNote

Operation	AttachFileToClientNote
Description	Attach file into a Client note record
Parameters	Integer <i>ClientNoteIdentifier</i> The Client Note identifier
	String <i>FileMimeType</i> The file MIME type. For examples: text/html, image/png, audio/mpeg, application/pdf, etc.
	String <i>FileName</i> The file name
	Base64Binary <i>Content</i> The content of the file which is represented as byte data.
Returns	<none>

5.20.15 GetClientKeySettingsByClientType

Operation	GetClientKeySettingsByClientType
Description	Get the Client key settings by Client Type
Parameters	Integer <i>ClientTypeIdentifier</i> The Client Type unique identifier
Returns	ClientTypeClientKeyInfo The returned result of the Client Type Client Key item details.

5.20.16 GetClientTypesWithClientKeySettings

Operation	GetClientTypesWithClientKeySettings
Description	Get one or more Client Types with Client Key settings
Parameters	Integer <i>ClientTypeIdentifier</i> The Client Type unique identifier
Returns	ClientTypeClientKeyInfo The returned result of the Client Type Client Key item details.

5.20.17 GetClientGenderList

Operation	GetClientGenderList
Description	Get one or more Gender information
Parameters	Boolean <i>SelectUsedGenderOnly</i> SelectExpired <i>ExpireStatus</i> The option to filter the expired reference data.
Returns	Array of < ReferenceDataItem > The reference data items for Client Gender. Please see the Web Service Data Model section for further information.