Confirm

Confirm Task Processor - CRM Agent
Version v18.20a.AM
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Confirm Task Processor

The Confirm Task Processor is an individual component within the Confirm release package and is installed as a Windows service through its installer. It supports processing of the Agents that are available within the 'Scheduled Tasks' screen.

In this section

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CRM Agent

Overview
This Agent is used to export newly created Enquiries and Enquiry updates to a Web Service. If new customer information is added to an Enquiry then this will also be exported with the Enquiry.

Operation
On each scheduled run, the Agent checks whether a new Enquiry has been created or updated and if customer details have been applied or amended against an Enquiry. These details will then be exported by the CRM Agent to a configured Web Service.

The Web Service may be a client specific plug-in that transforms the data into a format supported by the Clients Web Service.

The following changes to an Enquiry will trigger an export of the information after the next agent run:

• A new Enquiry has been created.
• An existing Customer has been added to an Enquiry.
• An Enquiry has been updated.
• A new Customer has been added to an Enquiry.

If the export fails for any reason (e.g. Web Service is down) then the export will be retried on the next agent run. Newer exports will be given priority.

It is possible to limit the number of exports the Agent will attempt to send on each run in the CRM Agent System Settings screen. When this limit is reached any Enquiries not yet exported will be sent on the next run of the Agent. This prevents the Agent from attempting to send a large number of Enquiries that may have built up if the Agent has not been able to run for some time.

Export Restrictions
The following can restrict or prevent Enquiry information being exported:

• The Export flag on Enquiry Subject should be checked.
• The configured Confirm users data security access to the Enquiry Subject.
• Enquiry information will not be exported to the same external system that the Enquiry or update originated from.

Configuration

This section details how to configure the CRM Agent.

1. Check that the CRM Agent Module (1437) is enabled.
2. Ensure that the agent is scheduled as a Task in the Scheduled Tasks screen within the Confirm client.
3. Configure the details of the Web Service that will receive the exported Enquiry information. This is achieved via the CRM Agent System Settings screen.
4. Ensure that the configured Web Service is configured and running.
5. Ensure the Task Processor is configured and running.