

**Salesforce.com Contact Data Import Functional Design Document**

Version 1.6

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**Revision History**

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| --- | --- | --- | --- |
| Version | Date | Author | Summary of Changes |
| 1.0 | 1/10/2014 | Susheela Kenchappa, Sreelatha | Initial draft |
| 1.1 | 2/12/14 | M. Schmidt | Update |
| 1.3 | 2/27/2014 | Sreelatha SK | Added fields based on requirements from Graham |
| 1.4 | 3/17/2014 | Sreelatha SK | Updated the fields specific to *Caller Type* |
| 1.5 | 3/17/2014 | Sreelatha SK | Updated the fields specific to *Caller Type* |
| 1.6 | 6/20/2014 | Sreelatha SK | YEP Team NLP, PhillyRisingArea added |
|  |  |  |  |

**Reviewers**

| Name | Position |
| --- | --- |
|  |  |
| Graham Quinn  Clinton Johnson  Kimberly Adams  Sheryl Johnson | City – 311 City SME |
| Edward Garcia | City – Project Manager |
| James Robb | City – Unisys Project Manager |
|  |  |

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# Overview

This document defines the data import strategy for loading constituent records into the SFDC platform from Novo.

# Pilot Implementation

## Goal

The business goal being addressed by this document:

1. The ability to import Contact records from the Call Center’s existing NOVO database into corresponding Contact records within Salesforce.

## Process

The steps needed to accomplish the Contact records import are:

1. Unisys creates the fields required for importing Contact records.
2. Unisys verifies the contact import template provided by the city and changes the column names (if required only) before importing.
3. Unisys will create the Master Account “General Citizens” to which all the imported Contacts will be associated.
4. Test Import:
   * Unisys creates a **official**.csv (comma separated value) file that contains a “header” record that defines the Contact Object fields and a couple of “detail” records that provide example data that simulates the data expected on an Contact record from the Call Center’s existing NOVO database application.
   * Unisys imports test .csv file into the Philly Sandbox to ensure the data loads properly
5. Final Import:
   * After the Test Import, and verification of the sample records imported. The complete records from the NOVO database will be imported to Philly Sandbox environment.

# Assumptions

The following table defines the assumptions of conditions that must be true for a successful implementation:

| **Assumption #** | **Assumption Description** | **Comments** |
| --- | --- | --- |
| ASSUMP1 | ~~City has to provide Unisys this data from one source in a comma-separate value (csv) file format~~  City will provide two comma separated value (csv) file for PublicStuff Contacts and Novo Contacts dump. |  |
| ASSUMP2 | Unisys will load a total combined maximum of ten thousand (10,000) citizen and community portal records from the csv file provided by the City into SFDC |  |
| ASSUMP3 | Unisys will not validate or clean the data provided by City. | The City of Philadelphia will be responsible for cleansing the customer data prior to importing into the SFDC platform. |
| ASSUMP4 | ~~City has to provide the Novo ID and PublicStuff ID as fields in the dump extract~~  As City is unable to provide the Novo ID and PublicStuff ID, Unisys will include the values as “Public Stuff/Novo /Both” based on source present in the systems. The dump containing “Both” will eradicate the duplicates. Email-ID is used as unique identifier in both the systems. |  |
| ASSUMP5 | During Citywide implementation, the data loaded during pilot will be overwritten with new dump. The salesforce latest data would be ignored. | Based on discussion with Graham, this assumption is made. |
| ASSUMP6 | For importing the Contact records, Account Name is considered as “General Citizen” for all type of source input | Source input includes contact information from Novo and Public Stuff. |
| ASSUM7 | Email-ID is considered as unique field for data import. If duplicate email-id exists in both Novo and PublicStuff, the details present in Novo will be present in the Salesforce. |  |
| ASSUM8 | **Contact: Enabled** should be non-blank value. When no value is present, “0” to be added during data import. | Only for Contact records on PublicStuff contains blank values. |
| ASSUM9 | **Contact: Country** should be non-blank value. When no value is present, “United States” to be added during data import. |  |
| ASSUM10 | **Contact: Last Name** should be non-blank value. When no value is present, **Contact: User Name** field value to be added during data import. | If Contact: Last Name value is non-blank, Contact: User Name field is ignored. |

# Salesforce Object: Contact

This section defines the field requirements to create the Contact records. In addition, the table provides the field format and structure details, which controls the display of these within the SFDC.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Type** | **Standard or Custom** | **History** | **Field Help Text** | **Comments** |
| Account Name | Lookup(Account) | Standard | No | None | Name of the Account to which the contact record is associated |
| Name | Name~~(Required)~~ | Standard | No | None | Name of the Contact. |
| Email | Email (Required) | Standard | No | None | Email Address of the Contact |
| Phone | Phone | Standard | No | None | Phone number of the Contact |
| Fax | Fax | Standard | No | None | Fax number of the Contact |
| Mailing Address | Address | Standard | No | None | Postal address of the Contact |
| PhillyRisingArea | Text(255) | Custom | No | None | Populated from GIS when Service Request location is vetted |
| YEP Team NLP | Text(25) | Custom | No | None | NLP Team name that the User can enter. |
| Website | URL | Custom | No | None | Website address of the Contact |
| Contact ID | Text(Unique) | Custom | No | None | Unique ~~Id associated with Contact record~~ |
| Contact Enabled | Checkbox | Custom | No | None | Specifies if contact is open for contact. |
| ~~Novo ID~~ | ~~Text(Unique)~~ | ~~Custom~~ | ~~No~~ | ~~None~~ | ~~Unique constituent ID from Novo~~ |
| ~~PublicStuff ID~~ | ~~Text(Unique)~~ | ~~Custom~~ | ~~No~~ | ~~None~~ | ~~Unique constituent ID from PublicStuff~~ |
| Source | Picklist  **Values**: Novo, PublicStuff, Both | Custom | No | None | Specifies if the contact is sourced from *Novo* or *PublicStuff* or *Both* |
| Caller Type | Picklist  Values: Citizen, Staff, Commissioner, Council Member, Mayor, Other | Custom | No | None | Specifies the caller type |

## Contact Mapping

|  |  |  |  |
| --- | --- | --- | --- |
| **Import Template Header field** | **Dump source** | **Salesforce field Names** | **Comments** |
| Account Name | Novo | Account Name |  |
| Contact: Id |  | Contact: ID | ~~Unique~~ constituent ID for a Contact |
| ~~Contact: Novo Id~~ |  | ~~Contact: Novo ID~~ | ~~Unique constituent ID from Novo database~~ |
| ~~Contact: PublicStuff Id~~ |  | ~~Contact: Public Stuff Id~~ | ~~Unique constituent ID from PublicStuff database~~ |
| Contact: Source | Not Applicable | Contact: Source | The value should be defaulted to  - Novo (if the contact is present only in Novo)  - PublicStuff (if the contact is present only in PublicStuff)  - Both (if the contact is present in both the system – Novo & PublicStuff) |
| Contact: User Name | PublicStuff | Contact: UserName |  |
| Contact: First Name | Both | Contact: FirstName |  |
| Contact: Last Name | Both | Contact: LastName | If Last Name is not present in importing data, User Name field value is added for Last Name. |
| Contact: Phone | Both | Contact: Phone |  |
| Contact: Email | Both | Contact: Email | Unique Email-ID for a Contact. Duplicates will not be considered. |
| Contact: Phone | Both | Contact: Phone |  |
| Contact: Fax | Novo | Contact: Fax |  |
| Contact: Website | Novo | Contact: Website |  |
| ~~Contact:~~ ~~Address 1 + Contact: Address 2~~  Contact: Mailing Street | Both | Contact: Mailing Street |  |
| Contact: City | Both | Contact: Mailing City |  |
| Contact: State/Province | Both | Contact: Mailing State/Province | The value should be defaulted to Pennsylvania If state name id PA  If State name is CA = California  <please provide valid State name> |
| Contact: Country | Novo | Contact: Mailing Country | The Value should be defaulted to United States  <For States - Data Needs to cleaned, as it contains Phila, Street addresses, and other values. Any value other than United States cannot be imported.> |
| Contact: Postal Code | Both | Contact: Mailing Zip/PostalCode |  |
| Contact: PhillyRisingArea | Novo | Contact: PhillyRisingArea |  |
| Contact: Enabled | Novo | Contact: Enabled |  |
| Contact: Login |  |  | Will not be importing this field as the values are same as Email field. |
| Contact: 2011 Earthquake |  |  | Will not be importing this field as all the values are Blank. |
| Contact: YEP Team NLP |  |  | To be Confirmed if this field values to imported. |
| Company Name |  |  | Will not be importing this field as the values are same as Account Name field. |
| Contact: Edit Link |  |  | Will not be importing this field as the values are same as Contact Name field. |
| Portal View: Portal View |  |  | Will not be imported assuming this field is reference for the coming IN. It contains   * City Council * Neighborhood Liaison * <*Blank*> |

# Issues

The following defines the Issues for Data Import of Contacts to SFDC.

| **Rule #** | **Issue Description** | **Comments** |
| --- | --- | --- |
| ISSUE001 | The dump provided has multiple entries of data in multiple columns as Contact and Account details. While developing the import template, only the contact records are considered. |  |
| ISSUE002 | *Account Name, Contact: Country, Contact: Enabled, Contact: Email, Contact: Last Name, Contact: Source* fields are required during Data Import. If any of these fields contacts blank value, then import for that record fails. |  |

# Verification of the Imported Records

This section defines the requirements needed to verify the imported Contact records.

* The Duplicate records in the import should be filtered through the unique Contact Id associated with each contact.
* Verify the number of the records imported are same as number of the records in the import file.

# City Action Needed

The following table describes the actions the City needs to perform for a successful implementation of the functionality being requested:

| **Action #** | **Action Description** | **Action Owner** |
| --- | --- | --- |
| ACT001 | The City will “cleanse” the Contact records that will be imported into Salesforce by **<Date to be specified>**. |  |
| ACT002 | On **<Date >** the City will provide the “official”.csv file that contains the “header” record and a “detail” record for each Contact record from the Call Center’s NOVO database that the City wants imported into Salesforce and sends the file to the Unisys BA via email, who will forward it to the Unisys Development Team. |  |

# Contact records Import template

The Contact records from the data dump will be imported to Contact object in SFDC. The import template is attached below for reference.

