# One pager for Clarizen interface automation

## Overview:

In order to create a sync mechanism between Clarizen and Priority we will build an interface based on SSIS packages.

A SSIS package will execute a ,NET console app that will use Clarizen API.

## Console details:

* 1. The console input\output will be CSV files.
  2. The console will include configuration that will include:
     1. Server.
     2. Input path.
     3. Output path.
  3. The console will also get Entity config file that will include:
     1. EntityName (Projects, Projects Details, Tasks, Users).
     2. Fields name (separated by ;).
     3. Filter (where clause).
     4. Fields that need to be return (like Project number when we insert new project).

* 1. Console switches:
     1. User name.
     2. Password.
     3. Config file.
     4. Entity config name.
     5. InputFileName – When insert\update data to Clarizen.
     6. OutputFileName – When we pull data from Clarizen.

1. Entity to sync:
   1. Projects:  
      Filter: All projects without value in C\_PriorityProjectNumberSO  
      Fields:  
      C\_SFDC\_Customer\_Number

C\_SFDC\_Contact\_Name

C\_SFDC\_Contact\_Job\_Title

C\_SFDC\_Contact\_Phone

C\_SFDC\_Contact\_Mobile

C\_SFDC\_Contact\_Email

ID

C\_SFDC\_Opportunity\_Number

C\_SFDC\_\_Customer\_PO

C\_SFDC\_Sales\_Rep\_Name

C\_SFDC\_Sales\_Rep\_Number

C\_SFDC\_Source\_of\_Opp

ProjectManager

Name

C\_SFDC\_Issue\_adv\_Payment\_Percentage

C\_SFDC\_OpportunityTotalBeforeDiscount

C\_SFDC\_Opportunity\_Discount

C\_SFDC\_OpportunityTotalAfterDiscount

RevenueCurrencyType

C\_SFDC\_Opportunity\_Special\_Comment

* 1. Tasks:  
     Filter: All tasks with value “salesforce” in C\_OriginatedFrom and C\_SyncedWithPriority is null  
     Fields:  
     C\_ProductSFDCCode

Name

C\_ProductSFDCQuantity

C\_PricingUnit

C\_SFDCProductListPriceNew

* 1. Tasks:  
     Filter: All tasks with value “PO- Created” in C\_POState   
     Fields:  
     C\_TranslatorID

C\_TotalPO

C\_Currency

OrderID

ID

C\_PriorityProjectNumberSO

Manager

* 1. Users:  
     Filter: All users with for related value “C\_TranslatorHasPriorityId” is null   
     Fields:  
     DisplayName

Email

BusinessAddress

C\_TCountry

OfficePhone

MobilePhone

C\_Currency

* 1. Tasks:

Filter: All tasks with value “PO- Updateded” in C\_POState   
Fildes  
C\_TotalPO

C\_TranslatorPONumber

1. Examples for updates:
   1. Update C\_TranslatorPONumber in Tasks by Project