

Technical specification document –

Account Salesforce Report

* New Account Report
* Blank Account Report

# INTRODUCTION

## **Objective**

An automated job is required to create New Account Report and Blank Account Report as per the accounts.csv file.

## **Scope**

## Job is scheduled to run every morning at 04:45 AM and afternoon at 04:30 PM from the production server and makes account file backup in archive folder

## **Functionality**

SSIS package is designed for this report and below are the activities the package performs.

## **New Account Report**

1. **Delete Accounts file if Exists**

Path

"**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Salesforce\_New\_Accounts.xls**"

“[**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Salesforce\_Blank\_Accounts.xls**](file:///\\hpm-fs1\Garden%20City\Data\New_account_Archive\Salesforce_Blank_Accounts.xls)”

1. **Import Excel**

Fetch data from “[**\\hpms.com\data\IKS\Salesforce\accounts.csv**](file:///\\hpms.com\data\IKS\Salesforce\accounts.csv)” file insert data into temporary table “**Temp\_Pesons**”.

Update Accounts if accounts already exists or any fields are changed in temporary table “**Temp\_Pesons**”.

1. **Compare and Insert Data Into “temp\_newaccount” Table**

Compare table “**temp\_persons**” data with “**temp\_person\_comp**” table and insert new account into “**temp\_newaccount**” table.

1. **Create File “Salesforce\_New\_Accounts Excel**

Create Excel file on below path

“[**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Salesforce\_New\_Accounts.xls**](file:///\\hpm-fs1\Garden%20City\Data\New_account_Archive\Salesforce_New_Accounts.xls)”

1. **Import Data into Excel File.**

Fetch data from “**temp\_newaccount**” table and import into excel file.

“[**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Salesforce\_New\_Accounts.xls**](file:///\\hpm-fs1\Garden%20City\Data\New_account_Archive\Salesforce_New_Accounts.xls)”

1. **Insert into “temp\_persons\_comp” Table**

New account field insert into “**temp\_persons\_comp**” table.

## **Blank Account Report**

1. **Create Salesforce\_Blank\_Accounts Excel.**

Create Excel file on below path

“[**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Salesforce\_Blank\_Accounts.xls**](file:///\\hpm-fs1\Garden%20City\Data\New_account_Archive\Salesforce_Blank_Accounts.xls)”

1. **Import Data into Excel file.**

Import data into excel from “**Temp\_Salesforce\_Pre7**”table for those whose “**account\_id**” is null.

## **Mail Report**

1. **Send Mail**

Send mail from

From “[**no-reply@healthplusmgmt.com**](mailto:no-reply@healthplusmgmt.com)“

To [**rptNewAcctReport\_SI@healthplusmgmt.com**](mailto:rptNewAcctReport_SI@healthplusmgmt.com) **,** [**mnunez@healthplusmgmt.com**](mailto:mnunez@healthplusmgmt.com), “**tceravino@healthplusmgmt.com “**

1. **Move files into Archive Folder**

Path – “**\\hpm-fs1\Garden City\Data\New\_account\_Archive\Archive\**”

**CODE – “SSIS Package” attached.**

