

**July 26, 2017**

Technical specification document –

Salesforce\_Export\_PatientReferral

# INTRODUCTION

# Objective

An automated report is required to show Sales force referrals data and the corresponding version of the document with all the modification made to the document since it was originally created with an audit trail of all users.

## Scope

The report will be generated thrice every day from the production server and will only report the documents that have been accepted on that give date until the time of execution of the report.

## Functionality

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

In this we have created two sequence containers, in order to run one after another.

## Sequence 1.

Step 1: Truncate the data from below tables

* **dbo.Temp\_Salesforce\_EMG**
* **dbo.Temp\_Salesforce\_Pre7**
* **dbo.t\_VW\_salesforce\_re2**

Step 2: Inserting the data into table “**t\_VW\_salesforce\_re2**” from table “**VW\_salesforce\_re2**“

Step 3: Inserting new patient appointment data into table “**Temp\_Salesforce\_EMG**”

Step 4: Inserting EMG appointments data into table “**Temp\_Salesforce\_EMG**”

Step 5: Inserting physical therapy appointments data into table “**Temp\_Salesforce\_EMG**”

## Sequence 2.

Step 1: If patient has three event types then take as per the create timestamp only one,

And insert those data into table “**Temp\_Salesforce\_Pre7**”

Step 2: Insert the table “**Temp\_Salesforce\_Pre7**” data into a .csv file on below path.

Path: “[**\\hpms.com\data\IKS\Salesforce\Patientreferrals.csv**](file:///\\hpms.com\data\IKS\Salesforce\Patientreferrals.csv)”

Step 3: Rename and archive the above created file in below path adding date to the file name.

Path: “[**\\hpms.com\data\IKS\Salesforce\Archive\Patientreferrals\_yyyymmdd.csv**](file:///\\hpms.com\data\IKS\Salesforce\Archive\Patientreferrals_yyyymmdd.csv)**”**

Step 4: Rename and archive one more file from below paths.

Source Path: “[**\\hpms.com\data\IKS\Salesforce\accounts.csv**](file:///\\hpms.com\data\IKS\Salesforce\accounts.csv)”

Archive Path: “**\\hpms.com\data\IKS\Salesforce\Archive\Account\accounts\_yyyymmdd.csv**”

## CODE “SSIS Package” Attached.

