Step-by-Step Process for SA USQ Automation

Introduction

Interloop receives an .xlsx file for each campaign run to their SFTP website. Upon receipt, Interloop's automation is triggered to start if the file naming convention is followed properly. Below is a high-level overview of the steps taken to get the original uploaded file to the final output table.

Step-by-Step Process

Step 1: Receiving the Excel File

Upon receiving the Excel file, the R# in the file name is saved off to be re-used later in the process. The schema of the file is also verified, and errors out if it is not the expected schema.

Step 2: Initial Data Cleaning

Begin with basic data cleaning. This includes:

- Removing any empty rows or columns
- Standardizing field names (snake case)

This initial step helps ensure that the data is ready for deeper analysis and transformation.

Step 3: Data Transformation

Transform the data as needed to fit the requirements of the final table. This includes:

1. Trim and lower user email then create new field combined (current volume + user email) where user email exists and vol is 0 or 1.
2. Get distinct combined email.
3. Extract email from combined as new field unique.
4. Add html code and create dealer field.
5. Create vol field.
6. Create sa_usq_list, cohort and vol2 fields.
7. Create sa_usq_list_00 and sa_usq_list_01 fields.

8. Make fields multi-select.
9. Finalize non-RAE fields.
10. Select 1 RAE for each user email.
11. Final selection of data with exceptions on RAEs.

These transformations convert the organized data into a table ready for updates in HubSpot.

Conclusion

By following these steps, the raw data from the Excel file is polished to a table that accurately and effectively presents the necessary information. This systematic approach ensures consistency and accuracy in the data transformation process.