**First priority is:**

Let’s start with:

* ClientsGet to get the list of all clients, including their ACCOUNT\_ID (which is the unique identifier)
* AccountsGet to get the details for each account, keying off the ACCOUNT\_ID from the prior line
* TransactionsGet to get the details for each account, again keying off the ACCOUNT\_ID from two lines up

**Q: You want client list along with its account details and transaction details, correct?**

[PA] Yes that is correct

Let’s break it down like this:

* Phase 1a: You guys recommend a database schema based on the above 3 asks, and we approve it.
* Phase 1b: Build the above APIs in .NET/C#.
* Setup automatic triggers to invoke the API transfer every day at a set time.

**Q: to achieve above requirement, we need to create 3 solution/projects.**

* 1. **Azure SQL Database project.**
  2. **ASP.NET WEB-API project which will request to all bank api and store data into azure sql server database.**
  3. **ASP.NET WEB-API is not automated system. We need to call ASP.NET WEB-API project method manually. To automate this api we need windows service project which will trigger automatic to invoke ASP.NET WEB-API method and rest thing ASP.NET WEB-API will do.**

**Please suggest your feedback on it.**

[PA] Yes that looks fine

REMOVE ANY fields that represent PII (Personally Identifying Information), so that would be first name, last name, and address. City/State/ZIP can be included as it's not PII. That said, encrypting the tables is fine too.

**Q: I will remove/ignore first name, last name and address information. I will not remove/ignore City/State/ZIP information and will store it into database.**

**Correct?**

[PA] That is correct

**Using SOAP 1.2.**

Regarding storing the credentials in a DB: The best practice our IT folks are using is to store the credentials in Azure Key Vault (<https://azure.microsoft.com/en-us/services/key-vault/>).

* **I need to explore this thing in more details.**

[PA] This one is second priority not immediately needed.

**When done with each phase we’ll have to copy to the client’s Azure account.**

**Q: What process we need to follow exactly when done with each phase?**

**Q: Which method we need to call? (ADO web service method or XML web service method)**

**(Example, we have 2 web service methods AccountsGetADO / AccountsGetXML for same purpose. We need to call which method (ADO or XML)?**

**XML is probably preferred since there are widely available parsers.**

**Q: How can I see web service interface/UI or how can I interact with web service method? I remembered when we had call you showed me web service method list in browser and also call one of web service method from browser. I want to know same thing.**

Test page is here:

<https://websvctest.globalclientsolutions.com/v3.0/webservices.asmx>

Connect to this site to see the SOAP test API's

<https://websvctest.globalclientsolutions.com/v3.0>  
User: StratFinWebSvcTest  
Passcode: Sw45YzGq  
  
I'm trying to figure out if any IP address whitelisting needs to happen for the test env  
  
I may need your IP you'll be calling from  
  
you'll also need Company ID: 6036335098002483  
  
there is no IP blacklisting so you're good to go now

Full API descriptions  are attached