Caselle

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Managing New Account Mapping

Creating new mapping

File requirements for list from Caselle

- All fields required to have a value
- File Headers:
  - ProfileName
  - ProfileItemName
  - CaselleDatabase
  - Table.FieldName
  - UsedForSearch
    - Must contain TRUE or FALSE
  - RecortType

Transform the Caselle data CSV into the needed JSON file

- Locate and open the solution CaselleAccountTemplateConverter.sln, contained in the Tools Repo
- Replace the CaselleProfileMapping.csv with your new file
- Ensure that accountTemplateConverter.ConvertToCSV() is commented out and that accountTemplateConverter.ConvertToMappingJson() is not commented out
- Run the solution in debug
- The JSON file will be populated in "Documents\Projects\Caselle\JSONFiles"

Update the Utopia solution

- Rename your newly created JSON file to just CaselleProfileMapping.json
- Copy the JSON file and paste it into Utopia under BusinessLogic -> Resources
  - Replace existing file if present

Test updated changes

- If you're set up locally with a Caselle template account you can run the UtopiaLocalDatabaseRefresher to clear and re-setup your accounts locally.
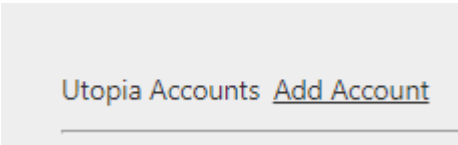
Set Up a Test for Account Template Changes

Create a New Account via a script

- Use the LastPass entry "The Hub DB Access" for information to get set up locally with the Hub database. (May need to request access)
- Use the script in LastPass under "Copy Hub Utopia Account SQL Script" to generate a new account with the associated features.
  - **Be sure to update** the **UtopiaAccountId** to one that matches what you're wanting to duplicate and the **UserId** to be your user ID, or the user ID you want associated with the account.
- Log into the Hub to verify the account is properly set up and associated with the correct user.

Create a New Account in the Hub Manually

**Note: requires manually adding the features. Strongly recommend using the script instead.

- Log into the Hub
- Go to the user and click Add Account

- Create the new test account

- Follow the configuration in this image (can set up for prod, but usually will use stage)

Create

Account Type	Revver
Account Status	Enabled
Storage Type	AWS_S3
Utopia Instance	(Dev Use Only) AWS Staging Utopia Instance
Partner	Caselle
Account Template	Caselle
Send Initial User Email	☑

Create

Back to User

- Click create
- Then go back and edit the account to add an expiration date.
- Add Features to the account

Create a New User in the Hub

It's easier to set up the new account under your user so you can add Caselle as a user, but if you don't need access and just want to set it up with their user here's the step for a new user.

- Create the new user
  - add the test email in the Login input field

EFC User Create

Login	test@caselle.com
Password	
Full Name	•••
Phone Number	
Company	
Address	
City	
State	
Postal Code	
Country	
Industry	

Create | Cancel