

# 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.
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