



How a healthcare company automated patient and order data delivery from Salesforce to Dimensions

Executive snapshot

A healthcare company that supports injured workers with medical equipment, mobility solutions, and home modification services used Salesforce to manage patient information and orders. Their downstream system, Dimensions, required CSV files delivered to an FTP server. The team exported data by hand, formatted CSV files, and uploaded them manually. This caused delays, errors, and constant rework.

RevSolutions built a full automation layer that collects patient data, Opportunities, and line items from Salesforce, converts everything into a Dimensions-ready CSV file, and pushes it to an FTP server on schedule. Dimensions then consumes the file without any human work.

About the client

The client works in the healthcare and workers' compensation space. They provide medical equipment, mobility support, and home modification services for injured workers. Their teams depend on accurate patient data and clean order details to coordinate with vendors and insurers.

The challenge

Salesforce held all patient and order data, but Dimensions needed CSV files that followed a strict format and had to be uploaded to an FTP server. The client handled this by hand.

Their process created problems:

- slow and manual CSV creation
- inconsistent formatting
- import failures in Dimensions
- delays in file delivery
- no tracking or audit trail
- heavy workload as volume grew

These gaps slowed case handling and created a clear need for automation.



Why RevSolutions joined the project

The client chose RevSolutions because they needed a partner who could automate a strict, file-based workflow. RevSolutions had strong experience in:

- Salesforce integrations
- FTP and CSV based data exchange
- Apex automation
- healthcare operations and compliance

Project goals:

- automate CSV generation and FTP upload
- reduce errors, remove manual tasks
- ensure accurate data delivery to Dimensions

The solution and implementation

RevSolutions designed a scalable automated system using Apex, CSV generation logic, and secure FTP integration.

1. Discovery and mapping

- collected all required Dimensions fields
- mapped Person Account data for patient fields
- mapped Opportunity data for order details
- mapped Opportunity Line Items
- defined formatting rules and value handling

2. Automated CSV creation

A custom Apex batch job:

- queried new or updated Opportunities
- combined patient, order, and line data into one CSV
- kept the Dimensions column order
- applied required formatting rules

3. Secure FTP delivery

- generated CSV files in Salesforce
- uploaded them to FTP with an automated connector
- allowed Dimensions to consume the file without staff involvement

4. Scheduling

- batch job ran on a fixed schedule
- exported only new or changed records
- created logs for all runs

5. Error handling

- retry logic for failed FTP connections
- error logs stored in Salesforce



- email alerts to admins
- audit trail for all delivered files

Most complex areas

- flattening patient, order, and line data into one structured CSV
- strict formatting rules
- stable handling of dropped connections

Results and impact

The automation changed how the team worked with Dimensions. They removed manual tasks and gained reliable data flow between systems.

Quantitative results

- 100% removal of manual CSV tasks
- 60-70% faster order processing
- major drop in data errors, stable and reliable file delivery

Qualitative improvements

- faster handoff between Salesforce and Dimensions
- consistent order records, lower staff workload
- better patient service timelines
- stronger compliance with insurer rules

Before vs after

- **Before:** manual CSV work, manual uploads, import failures, delayed transfer, heavy operational overhead
- **After:** automated CSV generation, automated FTP delivery, dimensions-ready formatting, real-time updates, staff focused on higher value tasks

Highlights and next steps

This project stood out because the team delivered near real time sync without webhook support. The solution stayed lightweight, stable, and ready for scale.

Next steps:

- Automated loyalty programs
- Marketing segmentation using Person Accounts
- E-commerce integrations
- Advanced dashboards for store performance