



CreateProductsQuickbooks-PeopleShores-ReadMe

Bot Scope

This bot automates in 4 different fields: Inventory, Non-inventory, Service, and Bundle.

Bot Overview

This bot performs the following:

- This bot logs into a given Quickbooks account.
- This bot reads from an Excel file, CreateProductsQuickbooks.atmx, and runs a bot of the desired name.
- The bot also creates an "Error Folder" with "Logs" and "Snapshots" Subfolders as shown below in the AA Directory hierarchy if there are errors.
- The path for Bot Store:
\$AAApplicationPath\$\Automation Anywhere\My Tasks\Bot Store\CreateProductsQuickbooks-PeopleShores

Pre-Requisites

- Automation Anywhere Enterprise v11.3.3.1
- Microsoft Excel
- Quickbooks Account
- Google Chrome
- MetaBot Designer
- 4 additional Bots: Inventory.atmx, Non-inventory.atmx, Service.atmx, and Bundle.atmx

Installation

- Download the bot from Bot store
- Unzip the zip archive
- For first time users, create "Bot Store" folder under<AA Directory>/My Tasks (on your local disk)
- Copy folder "CreateProductsQuickbooks-PeopleShores" to above created Bot Store folder inside<AA Directory>/My Tasks in Automation Anywhere folder on your local disk

Create the following folder structure for the content in the AA Dir:

- <AA Directory>
 - My Tasks
 - Bot Store
 - CreateProductsQuickbooks-PeopleShores (folder)
 - Error Folder
 - Log Folder
 - Snapshot Folder
 - Input Folder
 - CreateProducts-Quickbooks-PeopleShores.xlsx
 - Bundle.xlsx
 - Inventory.xlsx
 - Non-inventory.xlsx
 - Service.xlsx
 - My Tasks
 - Product Quickbooks.atmx
 - Bundle.atmx
 - Inventory.atmx
 - Non-inventory.atmx
 - Service.atmx
 - My MetaBots
 - Choose Product-Quickbooks.mbot
 - CreateProductsQuickbooks-PeopleShores-Readme.pdf

Using the Bot

Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
vErrorFolder	String	Input	This is the error folder for the bot.
vLogFolder	String	Output	This is the logs folder for the bot.
vSnapshotFolder	String	Output	This is the snapshots folder for the bot.

vUserId	String	Input	This holds the username to login to Quickbooks.
vPassword	String	Input	This holds the password to login to Quickbooks.
vInformation	String	Input	Required Field. This is Excel Column 1 in CreateProductsQuickbooks.xlsx. This contains the information on which task to automate.
vURL	String	Input	This is the URL for Quickbooks.
mProduct	String	Input	Required Field. This is an input variable inside the logic Product from MetaBot Choose Product-Quickbooks.
my-list-variable	String	Input	This is the default list variable for AA.
Prompt-Assignment	String	Input	This is the default value variable for AA.
Variables for Inventory.atmx			
Parameter Name	Type	Direction	Additional Info
my-list-variable	String	Input	This is the default list variable for AA.
Prompt-Assignment	String	Input	This is the default value variable for AA.
vName	String	Input	Required Field. This is Excel Column 1 in Inventory.xlsx.
vSKU	Numeric	Input	This is Excel Column 2 in Inventory.xlsx.
vCategory	String	Input	This is Excel Column 3 in Inventory.xlsx.
vClass	String	Input	This is Excel Column 4 in Inventory.xlsx.
vInitialquantityonhand	Numeric	Input	Required Field. This is Excel Column 5 in Inventory.xlsx.
vAsofDate	Date	Input	Required Field. This is Excel Column 6 in Inventory.xlsx.
vReorderPoint	Numeric	Input	This is Excel Column 7 in Inventory.xlsx
vInventoryAssetAccount	String	Input	This is Excel Column 8 in Inventory.xlsx
vDescription	String	Input	This is Excel Column 9 in Inventory.xlsx
vSalesPrice	Numeric	Input	This is Excel Column 10 in Inventory.xlsx
vIncomeAccount	String	Input	Required Field. This is Excel Column 11 in Inventory.xlsx
vSalesTaxCategory	String	Input	This is Excel Column 12 in Inventory.xlsx

vPurchasingInformation	String	Input	This is Excel Column 13 in Inventory.xlsx
vCost	Numeric	Input	This is Excel Column 14 in Inventory.xlsx
vExpenseAccount	String	Input	Required Field. This is Excel Column 15 in Inventory.xlsx
vPreferredVendor	String	Input	This is Excel Column 16 in Inventory.xlsx
Variables for Non-inventory.atmx			
Parameter Name	Type	Direction	Additional Info
my-list-variable	String	Input	This is the default list variable for AA.
Prompt-Assignment	String	Input	This is the default value variable for AA.
vName	String	Input	Required Field. This is Excel Column 1 in Non-inventory.xlsx
vSKU	Numeric	Input	This is Excel Column 2 in Non-inventory.xlsx
vCategory	String	Input	This is Excel Column 3 in Non-inventory.xlsx
vClass	String	Input	This is Excel Column 4 in Non-inventory.xlsx
vSell	String	Input	This is Excel Column 5 in Non-inventory.xlsx
vSalesDescription	String	Input	This is Excel Column 6 in Non-inventory.xlsx
vSalesPrice	Numeric	Input	This is Excel Column 7 in Non-inventory.xlsx
vIncomeAccount	String	Input	Required Field. This is Excel Column 8 in Non-inventory.xlsx
vSalesTaxCategory	String	Input	This is Excel Column 9 in Non-inventory.xlsx
vPurchase	String	Input	This is Excel Column 10 in Non-inventory.xlsx
vPurchaseDescription	String	Input	This is Excel Column 11 in Non-inventory.xlsx
vCost	Numeric	Input	This is Excel Column 12 in Non-inventory.xlsx
vExpenseAccount	String	Input	Required Field. This is Excel Column 13 in Non-inventory.xlsx
vPreferredVendor	String	Input	This is Excel Column 14 in Non-inventory.xlsx

Variables for Service.atmx			
Parameter Name	Type	Direction	Additional Info
my-list-variable	String	Input	This is the default list variable for AA.
Prompt-Assignment	String	Input	This is the default value variable for AA.
vName	String	Input	Required Field. This is Excel Column 1 in Service.xlsx
vSKU	Numeric	Input	This is Excel Column 2 in Service.xlsx
vCategory	String	Input	This is Excel Column 3 in Service.xlsx
vClass	String	Input	This is Excel Column 4 in Service.xlsx
vSell	String	Input	This is Excel Column 5 in Service.xlsx
vSalesDescription	String	Input	This is Excel Column 6 in Service.xlsx
vSalesPrice	Numeric	Input	This is Excel Column 7 in Service.xlsx
vIncomeAccount	String	Input	Required Field. This is Excel Column 8 in Service.xlsx
vSalesTaxCategory	String	Input	This is Excel Column 9 in Service.xlsx
vPurchase	String	Input	This is Excel Column 10 in Service.xlsx
vPurchaseDescription	String	Input	This is Excel Column 11 in Service.xlsx
vCost	Numeric	Input	This is Excel Column 12 in Service.xlsx
vExpenseAccount	String	Input	Required Field. This is Excel Column 13 in Service.xlsx
vPreferredVendor	String	Input	This is Excel Column 14 in Service.xlsx
Variables for Bundle.atmx			
Parameter Name	Type	Direction	Additional Info
my-list-variable	String	Input	This is the default list variable for AA.
Prompt-Assignment	String	Input	This is the default value variable for AA.
vName	String	Input	Required Field. This is Excel Column 1 in Bundle.xlsx
vSKU	Numeric	Input	This is Excel Column 2 in Bundle.xlsx
vDescription	String	Input	This is Excel Column 3 in Bundle.xlsx

vDisplay	String	Input	This is Excel Column 4 in Bundle.xlsx
vProduct	String	Input	This is Excel Column 5 in Bundle.xlsx
vQuantity	Numeric	Input	This is Excel Column 6 in Bundle.xlsx
lProduct	String	Input	This is the list variable for vProduct
lQuantity	Numeric	Input	This is the list variable for vQuantity

Error Handling

Each Bot folder contains the below hierarchy:

- Error Folder
 - Logs
 - Error Logs Month-Day-Year.txt: In case of any error, this file logs the error message along with time stamp
 - Snapshots
 - Error Snap Month-Day-Year.txt: In case of any error, this file captures the screenshot of the error.

Status of bot is set to Failed.

More Information

- All Excel Fields need to be set to Text format.
- To create a product in Quickbooks, the Product Information is a required parameter.
- To create an inventory in Quickbooks, the following fields are required parameters: Name, Initial Quantity on Hand, As of Date, Income Account, Expense Account.
- To create a non-inventory in Quickbooks, the following fields are required parameters: Name, Income Account (if the user decides to sell the product), Expense Account (if the user decides to purchase the product)
- To create a service in Quickbooks, the following fields are required parameters: Name, Income Account (if the user decides to sell the service), Expense Account (if the user decides to purchase the service)

- To create a bundle in Quickbooks, Name is a required parameter.
- The user needs to edit the variable called vURL to reflect the user's Quickbooks Account URL.
- All MetaBot files must be stored under \$AAApplicationPath\$/Automation Anywhere/My MetaBots.
- If you have any questions or feedback, please reach out to us at support@peopleshores.net.

Bot Deployment:

