

Create Target List – SugarCRM – ReadMe

Bot Overview

This bot performs the following:

- The bot logs into the given SugarCRM account.
- Creates new target lists in SugarCRM using Excel sheet, under SugarCRM's Marketing Director persona.
- It reads from the Excel Input file called "Create Target List SugarCRM Inputfile.xlsx" and creates a new target list in SugarCRM, for every row in the excel file.
- This bot also creates an "Error Folder" with "Logs" and "Snapshots" Subfolders in case there are any errors.

Pre-Requisites:

- Automation Anywhere Enterprise v11.3.3.1
- Microsoft Excel
- SugarCRM Account

Installation

- Download the bot from the 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 "CREATE TARGET LISTS SugarCRM - PEOPLESORES" to above created Bot Store folder inside <AA Directory>/My Tasks/Bot Store, in Automation Anywhere folder on your local disk.

Create the following folder structure of the content in the AA Directory:

<AA Directory>

- My tasks
 - Bot store
 - CREATE TARGET LISTS SugarCRM - PEOPLESORES (Folder)
 - Error Folder
 - Logs (Folder)
 - Snapshots (Folder)
 - InputFiles
 - Create Target Lists SugarCRM Inputfile.xlsx
 - My Tasks
 - Create Target Lists SugarCRM.atmx
 - Create Target Lists SugarCRM.pdf

How to use the Bot:

Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
Name	String	Input	<p>This will be the Name of the Target List. This is Excel Column (1).</p> <p>This is a MANDATORY field. The Target List draft cannot be saved without the Target List's name.</p>
Description	String	Input	<p>This is the description of the target list the user is writing. This is Excel column (2).</p>
Type	String	Input	<p>This is an Excel Column (3). This is type of target list the user is associating with. Values for this field include –</p> <ul style="list-style-type: none">- Default- Seed- Suppression List – By Domain- Suppression List – By Email Address- Suppression List – By Id- Test
Domain_Name	String	Input	<p>This is an Excel Column (4). This is the name of the domain for said target list.</p> <p>Note: This field ONLY appears when the Type is set to "Suppression List – By Domain".</p>
Assigned_To	String	Input	<p>This is an Excel column (5). This is the user the Target List is assigned to. The user must be in the Sugar CRM system already. Else, add the user into the Sugar CRM system separately.</p> <p>Note: The default is the current user already signed in, ONLY if there is no user the Excel cell.</p>
Number_Of_Teams	Value	Input	<p>This is Excel column (6). Since the Target Lists can be associated to multiple teams, this column indicates the Number Of Teams that it is associated with.</p> <p>E.g. 5</p>

Primary_Team	String	Input	This is Excel column (7). This is Team 1. This column should have the Name of the Team that is Primary. If no team is provided in this column (i.e if the column is left blank) GLOBAL will be the default team as Primary. E.g. Global
Tags	String	Input	This is an Excel Column (8). A comma can be used to separate a list of tags, if there are multiple tags.
Team2	String	Input	This is Excel Column (9). This is the additional team that the task is associated with. E.g. Sugar Rep
Team3	String	Input	This is Excel Column (10). This is the additional team that the task is associated with. These additional fields will not be there if there is only 1 team (which would be the Primary Team). E.g. West
Team4...as required			There will be Team4, Team5 ...etc if needed. Note: The user can add more team columns in the InputFile if needed.
Other Variable Information			
AAApplicationPath	String	Input	This system variable is the default gateway folder to where the files for the Taskbot is stored.
vErrorFolder	String	Input	This is the error folder inside the bot folder which contains the Log and Snapshot folders (already defined, no need to change unless you wish to change location of the file).
vLogFolder	String	Input	This folder contains the error log file in case of an error. (Already defined, no need to change unless you wish to change location).
vSnapshotFolder	String	Input	This folder contains Screenshot of the error in case of an error (Already defined,

			no need to add value unless want to change location of file).
Input_File	String	Input	Provide the exact name of the input file in the InputFiles directory.
URL	String	Input	Provide URL for your project in SugarCRM

Error Handling

- Each Bot folder contains the below hierarchy.
 - o Error folder
 - Logs
 - Error logs Month-Day-Year.txt: In case of any error, this file logs error message along with time stamp.
 - Snapshots
 - Error Snap Month-Day-Year.png: In any case of any error, this file captures screenshot of error.
- Task status of bot is set to failed in case of error.

More Information

- All excel fields need to be set to text format.
- User needs to edit variable called Input_File to reflect the location/path where the Excel Input file is located (if needed).
- User needs to edit the variable called URL to reflect the User’s Sugar CRM Account URL.
- This Task is created using the Sugar CRM’s – Marketing Director persona.
- **Name Title** is a MANDATORY field. The user’s target draft list will NOT be saved if the Title Name is left blank.
- This bot will log out when all Target Lists are completed.
- This bot will close the Excel sheet when all Target Lists are completed.
- **See below for input file reference:**

Name	Description	Type	Domain Name	Assigned To	Number of Teams	Primary Team	Tags	Team 2	Team 3	Team 4	Team 5
	Testing NULL Name										
Test2	Testing Testing	Id		Jane Smith	3	Global	Test,Testing	West	East		
Test3	Third Initial Test	Domain	Testing	Sugar Rep	1	Global	Test	West	East	Sugar Support	

Bot Deployment

