

Create Campaign SugarCRM - ReadMe

Bot Overview

This bot performs the following:

- The bot logs in to a given SugarCRM account.
- It reads from the Excel Input file called **Create_Campaign_SugarCRM_Inputfile.xlsx** and creates a new Campaign in SugarCRM, for every row in the excel file, using the Sugar CRM's – Marketing Director persona.
- This bot also creates an "Error Folder" with "Logs" and "Snapshots" Subfolders for if there are errors.

Pre-Requisites

- Automation Anywhere Enterprise v11.3.3.1
- Microsoft Excel
- Sugar CRM Account

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 "CREATE CAMPAIGN SugarCRM - PEOPLESORES" 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

✦ CREATE CAMPAIGN SugarCRM - PEOPLESORES (Folder)

- Error Folder ○ Logs (Folder) ○ Snapshots
(Folder)
- InputFiles ○
Create_Campaign_SugarCRM_Inputfile.xlsx
- My Tasks ○
Create_Campaign_SugarCRM.atmx

- Create Campaign SugarCRM-PeopleShores-ReadMe

How to use the bot:

Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
Name	String	Input	Name of the Campaigner. This is a Mandatory Field . This is Excel Column (1).
Status	String	Input	The Status of the Campaign. There are only six acceptable inputs: Planning, Active, Inactive, Complete, In Queue, or Sending . All inputs must be spelled correctly, and there must be an input since this is a Mandatory Field . Six down arrows, then press tab. This is Excel Column (2).
Start_Date	String	Input	This is the Start Date of the Campaign. The inputs MUST be a valid value in the format mm/dd/yyyy. (eg. 12/25/1999) Otherwise there will be an error. This is Excel Column (3).
Type	String	Input	This is the Type of Campaign. There are only eight acceptable inputs: Telesales, Mail, Email, Print, Web, Radio, Television, or Newsletter . This input cannot be left blank; this is a Mandatory Field . This is Excel Column (4). Note: If Newsletter is the inputted type, a Frequency field will be added to the page (so Object cloning is dangerous, Delete me). Otherwise, Frequency is skipped.
End_Date	String	Input	This is the End Date of the Campaign. The inputs MUST be a valid value in the format mm/dd/yyyy. (eg. 12/25/1999) Otherwise there will be an error. This input cannot be left blank, or incorrect, as it is a Mandatory Field . This is Excel Column (5).

Frequency	String	Input	The Frequency of the Newsletter Campaign. This field is only accessible if the Campaign Type is Newsletter. Otherwise, this field will be skipped. The inputs then would be Weekly, Monthly, Quarterly, or Annually . Any other input would be incorrect. This is Excel Column (6).
Currency_ID	String	Input	This is the Identification of the Currency used for the campaign. There are only 3 acceptable inputs: US Dollars, Euro, or Pounds . Anything else is wrong and will error out the code. Anything blank will default to US Dollars This is Excel Column (7).

Impressions	String	Input	This is the number of Impressions for the Campaign. This is Excel Column (8).
Budget	String	Input	This is the Campaign Budget. The input should be numeric, with no commas or dollar signs. This is Excel Column (9).
Expected_Cost	String	Input	This is the Expected Cost of the Campaign. The input should be numeric, with no commas or dollar signs. This is Excel Column (10).
Actual_Cost	String	Input	This is the Actual Cost of the Campaign. The input should be numeric, with no commas or dollar signs. This is Excel Column (11).
Expected_Revenue	String	Input	This is the Expected Revenue of the Campaign. The input should be numeric, with no commas or dollar signs. This is Excel Column (12).
Objective	String	Input	This is the Objective of the Campaign. This is Excel Column (13).
Description	String	Input	This is the Description of the Campaign. This is Excel Column (14).
Assigned_To	String	Input	This is the person this Campaign is Assigned To. There should be an existing name, or it will error out. If left blank, it will default to Jane Fitzpatrick. This is Excel Column (15).

Number_Of_Teams	String	Input	This is the Number of Teams for the Campaign. This determines the number of teams to add to the Teams Field. This is a Mandatory Field . If Left blank, the code will error out. If there are no new teams to add or any changes or blank inputs in Primary Team, input 0. This is Excel Column (16).
Primary_Team	String	Input	This is the Primary Team Column. The Campaign page only accepts one Primary Team. The input must always be a Team, even if there are multiple teams to add. This is a Mandatory Field, and if the input is blank, it will default to Global . This is Excel Column (17).
Select_Targets	String	Input	This is the Name of the existing Target List to select from the SugarCRM directory and add to the specific Campaign. This indicates the name of the Excel Sheet to use as inputs for the specific Target List section of code. This is a Mandatory Field ; although it can be left blank, the inputs must be accurate to match the custom Excel Sheet name. Otherwise it will error out. See the More Information section . This is Excel Column (18).

New_Trackers	String	Input	This is the Name of the New Tracker URL, or Trackers to create. This indicates the name of the Excel Sheet to use as inputs for the specific Tracker section of code. This is a Mandatory Field ; although it can be left blank, the inputs must be accurate to match the custom Excel Sheet name. See the More Information section . This is Excel Column (19).
New_Email_Market	String	Input	This is the name of the New Email Market, or Markets to create. This indicates the name of the Excel Sheet to use as inputs for the specific Market section of code. This is a Mandatory Field ; although it can be left blank, the inputs must be accurate to match the custom Excel Sheet name. If there are no excel sheets to run, this field must be blank. If there are Spelling must be perfect and must match the existing Excel Sheet. See the More Information section . This is Excel Column (20).

The following input variables are run in Active Sheet (Select_Targets).			
Session_Target	String	Input	This is a storage variable that stores the currently updated name of the Target Excel Sheet. It is used as a new Excel Sheet Session for Target List inputs and code.
Target_Name	String	Input	<p>This is the name of the specific existing Target List from the SugarCRM directory to add to the Campaign. The input spelling and positioning of any input symbols must be 100% perfect and accurate in matching the existing Target List.</p> <p>Inputs can include newly created Target Lists from the Target List bot, but the bot must be run successfully, Target Lists must be successfully added to the directory, and must be done before the Campaign bot is running on the same exact directory. Pay very close attention to the URLs.</p> <p>If the input does not exist, or the spelling is incorrect, this will error out the code. Be mindful of duplicates in the directory and avoid putting duplicates in the input files. This is Excel Column (1) of Active Sheet (Target#).</p>
The following four input variables are run in Active Sheet (New_Trackers).			
Session_Track	String	Input	This is a storage variable that stores the currently updated name of the Tracker Excel Sheet. This is
			assigned the input from the New_Trackers field. It is used as a new Excel Sheet Session for Tracker URL inputs and code.
Tracker_Name	String	Input	The Name of the Tracker. This is a Mandatory Field. See the More Information section. This is Excel Column (1) of Active Sheet (Tracker#).
Opt_Out_Link	String	Input	This decides if you want to opt out. If yes, the checkbox is marked, and Tracker URL is skipped. If no, move on. See the More Information section. This is Excel Column (2) of Active Sheet (Tracker#).

Tracker_URL	String	Input	This is the Tracker URL. If the Opt Out Link is not checked, this is a mandatory field. See the More Information section. This is Excel Column (3) of Active Sheet (Tracker#).
The following eleven input variables are run in Active Sheet (New_Email_Market). See the More Information section.			
Session_Market	String	Input	This is a storage variable that stores the currently updated name of the Market Excel Sheet. This is assigned the input from the New_Email_Market field. It is used as a new Excel Sheet Session for Email Market inputs and code.
Market_Name	String	Input	This is the Name of the Email Marketing. This is a Mandatory Field. This is Excel Column (1) of Active Sheet (Market#).
Market_Start_Date	String	Input	This is the Start Date of the Email Marketing. This is a Mandatory Field. The format must be perfect. This is Excel Column (2) of Active Sheet (Market#).
Market_Start_Time	String	Input	This is the Start Time of the Market. This is a Mandatory Field. The format must be a numeric form of 23:00; four digits for the hours and minutes. Otherwise it will crash the code. This is Excel Column (3) of Active Sheet (Market#).
Use_Mailbox	String	Input	This decides if you want to use an existing mailbox, or not. Conditional, Yes or No This is Excel Column (4) of Active Sheet (Market#).
Market_Status	String	Input	This is the status of the Market Email, and is a Mandatory Field. The status is either Active or Inactive; there can be no other input, or it will error out. This is Excel Column (5) of Active Sheet (Market#).
Email_Template	String	Input	Type it in exactly. There can be custom Email Templates. This is Excel Column (6) of Active Sheet (Market#).
From_Name	String	Input	This is the from name. If the Mailbox is used, this field will be already filled, and the inputs are not used. This is Excel Column (7) of Active Sheet (Market#).

From_Address	String	Input	This is the from address. If the Mailbox is used, this field will be already filled, and the inputs are not used. This is Excel Column (8) of Active Sheet (Market#).
Reply_To_Name	String	Input	This is the name of the person who will reply. This is Excel Column (9) of Active Sheet (Market#).
Replay_To_Address	String	Input	This is the address of the person who will reply. This is Excel Column (10) of Active Sheet (Market#).
The following variables are either static input fields, or a modified excel column locator field.			
vErrorFolder	String	Input	This is the error folder inside the bot folder, which contains the Error Log folder and the Snapshot folder. (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).
InputFile	String	Input	Provide the exact name of the input file in the InputFiles directory.
URL	String	Input	Here is the URL of the Sugar CRM website for the (e.g https://tkyjhb8322.trial.sugarcrm.com)
Locate_Team	String	Input	This is a locator variable used to navigate through additional custom Excel Columns that have additional teams. The additional teams must not be primary teams, as they will not be recognized as such in the code. (The excel columns that are located will be called Team_2, Team_3, etc.)

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 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 sent to failed.

More Information

- This bot is dependent on 'Create Target Lists SugarCRM.atmx' which creates the target list. It is Important to have the bot folder 'CREATE TARGET LIST SugarCRM – PEOPLESORES' in 'Bot Store' folder before we run this bot.
- This program may utilize custom input Excel Sheets for Targets, Trackers and Email Market, to enable functionality to create multiple Trackers and multiple Email

	O	P	Q	R	S	T	U
1	Assigned_To	Number_Of_Teams	Primary_Team	Select_Targets	New_Trackers	New_Email_Market	Team_2
2	Will Westin	4	West	Target1	Tracker1	Market1	Global
3		1	West		Tracker2		
4	Will Westin	1	Global			Market3	
5		0		Target4			
6							

Markets per Campaign. It is essential that if custom Excel Sheets are made, they must follow a very specific format.

- o Name of the Excel Sheet must match the name in the Sheet1: Select_Targets, New_Trackers, New_Email_Market, or any combination of the three. Below are the example inputs for the names of the Excel Sheets.
- o Target Excel Sheets has 1 excel column specific to the Target# sheet, which is Target_Name in Excel Column (1). If the header is NOT set for these custom sheets, the code will error

out. **MAKE SURE THE INPUTS MATCH AND EXISTS IN THE SUGARCRM DIRECTORY.**

	A	B	C	D	E	F	G
1	Target_Name						
2	Test5						
3	LDAP Subscription List						
4	Test2						
5	Test4						
6							

- Tracker Excel Sheets have 3 excel columns specific to the Tracker# sheet: Tracker_Name is Excel Column (1), Opt_Out_Link is Excel Column (2), and Tracker_URL is Excel Column (3). If these headers are NOT set for these custom sheets, the code will error out.

	A	B	C	D	E	F	G	H	I	J
1	Market_Name	Market_Start_Date	Market_Start_Time	Use_Mailbox	Market_Status	Email_Template	From_Name	From_Address	Reply_To_Name	Reply_To_Address
2	MPLS	09/20/2010	09:00	Yes	Inactive	Bad Encryption Template			Secure Sockets	Two VLAN Switches
3	Multi Protocol	09/09/2000	08:00	No	Active	Bad Email Templ	Traffic Spiking	Tagging	DDOS	Two VLAN Switches
4										
5										
6										

	A	B	C	D	E
1	Tracker_Name	Opt_Out_Link	Tracker_URL		
2	Acceptable Use Policy	No	ADP.com		
3	Non-disclosure Agreement	Yes	enniotracker.com		
4					
5					
6					

- Market Excel Sheets have 10 excel columns specific to the Market# sheet: Market_Name, Market_Start_Date, Market_Start_Time, Use_Mailbox, Market_Status, Email_Template, From_Name, From_Address, Reply_To_Name, and Reply_To_Address, are Excel Columns (1, 2, 3, 4, 5, 6, 7, 8, 9, and 10), in that specific order. Be careful not to forget to add the specific headers in that order.

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	A	B	C	D
1	Tracker_Name	Opt_Out_Link	Tracker_URL	
2				
3				
4				
5				
6				

Sheet1 | Target# | **Tracker#** | Market#

	A	B	C	D	E	F	G	H	I	J
1	Market_Name	Market_Start_Date	Market_Start_Time	Use_Mailbox	Market_Status	Email_Template	From_Name	From_Address	Reply_To_Name	Reply_To_Address
2										
3										
4										
5										
6										

Sheet1 | Target# | Tracker# | **Market#** | Target1 | Tracker1 | Market1 | Tracker2 | Market3 | Target4

- For ease of input setup, Three excel sheet Templates will be provided. Copy them, rename them, and add your inputs. It is also advisable to keep the sheets organized. The code is not dependent on specific ordering, as it will simply call what excel sheet name is in the Select_Targets, New_Trackers, or New_Email_Market

	A	B	C	D
1	Target_Name			
2				
3				
4				
5				
6				

Sheet1 | **Target#** | Tracker# | Market#

- ○

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- In **Email Marketing**, the option to send the message to a specific target list is currently unfeasible at the time. The code will always automatically checkbox Select to choose all Target List(s) in the Campaign. The Target List is handled and generated by another Taskbot. There is no available code that can read the textbox, search the specific list by keystrokes or object cloning, and properly select the target name. This is a functionality that requires human decision and manual input, which is beyond the capability of the Taskbot. The test cases for the Target list would be infinite, and the potential for failed taskbot runs is inevitable, because there is no set order for the list, and no set limit to

the list, and can often

O	P	Q
Assigned To	Number Of Teams	Primary Team
Will Westin	1	West

overwrite. The Target List may be empty, which further complicates the decision-making capabilities. Since this is a required field, the only acceptable solution is to Select to Choose all Target List(s) in the Campaign, even if it is empty.

- **INPUT ERROR: UNAUTHORIZED INPUT COMBINATIONS.** The combination of certain inputs this campaign is **Assigned To**, and **only one team** that populated that is **not Global**, may run into a **permission error**. Once the program attempts to save, the page will display an error retrieving record, and either the record is deleted or unauthorized. This will crash the code. However, if there is more than one team, and it includes the Global Team either as primary or not, the permission issues so far are **not triggered**. This is a reminder to be mindful of what permissions that the input combinations are allowed.



- Below are some example inputs that trigger the above web page error message:

- - - All date

End Date: *	9/27/2018	(mm/dd/yyyy)
	Invalid Value: End Date	
End Date: *	09/27/2018	(mm/dd/yyyy)

variable inputs must be exactly the following format: mm/dd/yyyy. Otherwise, an error will occur. Below are the 2 inputs, the first is incorrect, the second is in the proper acceptable format:

-
-
- If the Number_of_Teams is greater than one, the number of additional excel columns for emails **in addition** Primary Email **must have a total value that will match the value**

of the Number_Of_Teams. For example, if there are 2 emails, one is always primary, and the other is secondary. There will be one column in addition to the Primary Team column, so the Number_Of_Teams must equal to 2. If the value does not match the correct total amount columns used, there may be errors in automating.

- Any excel sheets with a Sheet# are additional test cases. In the code, the first open excel sheet command can be modified to check other test cases. Be sure to change the name from the textbox underneath Specific Sheet name. (eg. Sheet1, Sheet2, Sheet3)

Open Spreadsheet:

Session Name:

e.g. Session1 or S1

Spreadsheet Path:

e.g. C:\Working\Excel1.xls

Specific Sheet Name:

e.g. Sheet1 or SHEET1

Contains Header 

Load Add-ins

	A	B	C	D	E	F
1	Name	Status	Start_Date	Type	End_Date	Frequency
2	Ennio	Planning	01/07/0001	Email	04/09/2024	Annually
3	H.323	Active	01/07/0060	Newsletter	02/10/2000	Monthly
4	LDAPS	In Queue	03/05/0900	Newsletter	02/10/2000	Quarterly
5	Rebecca	Complete	10/06/1936	Television	01/25/1995	

	G	H	I	J	K	L
1	Currency_ID	Impressions	Budget	Expected_Cost	Actual_Cost	Expected_Revenue
2	Pounds	0	140000000	1000	1534	100000000000
3	Euro		400000			
4		32	20000			
5	Euro	4	10000000			

	M	N	O	P	Q
1	Objective	Description	Assigned_To	Number_Of_Teams	Primary_Team
2	Create a huge profitable business	This is a business share deal	Will Westin	4	West
3				1	West
4			Will Westin	1	Global
5				0	

	AO	AP	AQ	AR	AS	AT	AU	AV
	FY_End	Facebook_Link	Twitter_Link	Company_Facebook	Company_Twitter	Email_2	Email_3	Email_4
2019	EnnioColon.com	@enniocolon	Peopleshores	@Peopleshores_US	steven@universal.com	ennio.colon@hotmail.com	ollie.deeley@peopleshores.net	
2024	Barbara.com	@Nyguen_Barbar	ennio.com	@Ennio_US	spielberg@universal.com			

	R	S	T	U	V	W
1	Select_Targets	New_Trackers	New_Email_Market	Team_2	Team_3	Team_4
2	Target1	Tracker1	Market1	Global	North America	East
3		Tracker2				
4			Market3			
5	Target4					

Bot Deployment

