

## Create Contact 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\_Contact\_SugarCRM\_Inputfile.xlsx** and creates a new contact in SugarCRM, for every row in the excel file, using the Sugar CRM's - Customer Support Lead persona.
- This bot also creates an "Error Folder" with "Logs" and "Snapshots" Subfolders for if there are errors.

### Pre-Requisites

- Automation Anywhere Enterprise v10.7
- 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 CONTACT 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
  - o Bot Store
    - CREATE CONTACT SugarCRM - PEOPLESORES (Folder)
      - My Tasks
        - o Create\_Contact\_SugarCRM.atmx
      - Error Folder
        - o Logs (Folder)
        - o Snapshots (Folder)
      - InputFiles
        - o Create\_Contact\_SugarCRM\_Inputfile.xlsx

## How to use the bot:

### Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
Salutation	String	Input	Salutation goes before the First Name of the contact, if applicable. Salutation is either Mr., Ms., Mrs. Dr. Prof, or skipped. This is Excel Column (1).
First_Name	String	Input	This is the First Name of the Contact. This is Excel Column (2).
Last_Name	String	Input	This is the Last Name of the Contact. <b>This is a mandatory field.</b> This is Excel Column (3).
Title	String	Input	This is the Title of the Contact. This is Excel Column (4).
Mobile	String	Input	This is the Contact Mobile Phone number. The format should be +1 – xxx – xxx – xxxx. This is Excel Column (5).
Department	String	Input	This is the Department of the Contact. This is Excel Column (6).
Call	String	Input	Call is either Yes or No. This will determine if the Contact wants to be called or not. If Call is No, the Do Not Call checkbox will be marked with a check. If Call is Yes, the Do Not Call checkbox will remain unchecked. This is Excel Column (7).
Account_Name	String	Input	This is the Account Name of the Contact. This input has 2 requirements, the Account Name must exist in SugarCRM's directory, and there must be no spelling errors. This is Excel Column (8).
Number_Of_Email	String	Input	The contact can have multiple emails. This column indicates how many email addresses will be added to the Contact's business card. This is Excel Column (9).  E.g. 4
Primary_Email_Address	String	Input	This is the Contact's Primary Email Address. Other Email Addresses are separated by new columns towards the end of the Input file. The input for Primary Email Address <b>MUST</b> be the primary choice. This is Excel Column (10).

Tags	String	Input	This is the Contact's tags. There may be more than one tag, each separated by a comma. This is Excel Column (11).
Primary_Address	String	Input	This is the Primary Street Address of the Contact. The address must be up to 35 characters maximum, as stated by the international standard. This is Excel Column (12).
Primary_City	String	Input	This is the Primary City Address of the Contact. This is Excel Column (13).
Primary_State	String	Input	This is the Primary State Address of the Contact. It can either be a full name or an abbreviation of the State. (ex. California or CA) This is Excel Column (14).
Primary_Postal_Code	String	Input	This is the Primary Postal Code of the Contact. This is Excel Column (15).
Primary_Country	String	Input	This is the Primary Country of the Contact. (ex. United States) This is Excel Column (16).
Copy_Primary	String	Input	Copy Primary is either Yes or No. This determines whether the Primary Address fields should be copied to the Alternate Address fields. If Copy Primary is Yes, it will leave the alternate address fields alone. If Copy Primary is No, the bot will uncheck the checkbox, clear the copied fields, and populate the Alternate Address fields. (Functionality is done by a checkbox Copy primary address to alternate address) This is Excel Column (17).
Alt_Address	String	Input	This is the Alternate Street Address of the Contact This is Excel Column (18).
Alt_City	String	Input	This is the Alternate City address of the Contact. This is Excel Column (19).
Alt_State	String	Input	This is the Alternate State address of the Contact. This is Excel Column (20).
Alt_Postal_Code	String	Input	This is the Alternate Postal Code of the Contact. This is Excel Column (21).
Alt_Country	String	Input	This is the Alternate Country of the Contact. The input can be the same as the Primary Address, or it can be left blank. This is Excel Column (22).
Office_Phone	String	Input	This is the Contact's Office Phone number. The input should be the same telephone number format as the Mobile Phone. This is Excel Column (23).

Fax	String	Input	This is the Contact's Fax number. Same telephone format as Office Phone and Mobile. This is Excel Column (24).
Assistant	String	Input	This is the name of the Contact's Assistant. This is Excel Column (25).
Assistant_Phone	String	Input	This is the phone number of the Contact's Assistant. Use the same telephone number format. This is Excel Column (26).
Description	String	Input	This is the Contact's Description. This is Excel Column (27).
Reports_To	String	Input	This is the name of the person the contact reports to. This input has 2 requirements, the name must exist in SugarCRM's directory, and there must be no spelling errors. This is Excel Column (28).
Sync_Mail	String	Input	Sync Mail is either Yes, or no. This will determine whether Sync to Mail Client checkbox should be checked or unchecked. If Sync Mail is Yes, it will leave it checked. If No, it will leave it unchecked. This is Excel Column (29).
Lead_Source	String	Input	This is the Contact's Lead Source. This input has 2 requirements, the field must exist within SugarCRM's directory, and there should be no spelling errors. This is Excel Column (30).
Assigned_To	String	Input	This is the name of the person the Contact is assigned to. This input has 2 requirements, the field must exist within SugarCRM's directory, and there should be no spelling errors. This is Excel Column (31).
Campaign	String	Input	This is the Contact's Campaign. The input needs to exist in the SugarCRM's directory, and the spelling must be exact. This is Excel Column (32).
Language	String	Input	This is the Contact's Preferred Language. It is recommended that the input is exact, particularly for English (UK) or English (US). This is Excel Column (33).
Portal_Name	String	Input	This is the Contact's Portal Name. <b>Warning.</b> This field <b>must not have an existing Portal Name assigned to another contact.</b> Otherwise it will error out. This is Excel Column (34).
Portal_Active	String	Input	Portal_Active can be either Yes or No. This is used to determine whether the Portal should be active. If Yes, the checkbox is checked. If No, the checkbox is left unchecked. This is Excel Column (35).

Password	String	Input	This is the Contact's Password. This field will be used twice to confirm the Contact's password. This is Excel Column (36).
Company_Website	String	Input	This is the Contact's Company Website. This is Excel Column (37).
Education	String	Input	This is the Education of the Contact. This is Excel Column (38)
Education_Additional	String	Input	This is the Additional Education of the Contact. This is Excel Column (39)
Previous_Jobs	String	Input	This is the Additional Jobs of the Contact. This is Excel Column (40).
Company_Size	String	Input	This is the Contact's Size of the Company. This is represented by number. This is Excel Column (41).
Industry	String	Input	This is the Contact's Industry. This is Excel Column (42).
Company_Location	String	Input	This is the Contact's Location of the Company. This is Excel Column (43).
Company_Description	String	Input	This is the Description of the Contact's Company. This is Excel Column (44).
Year_Founded	String	Input	This is the year that the company was founded. There should only be 4 values for the year. This is Excel Column (45).
Industry_Tags	String	Input	This is the tags for the Industry of the Contact. There can be multiple tags in the same column. This is Excel Column (46).
NAICS_Code	String	Input	This is the NAICS Code of the Contact. NAICS stands for North American Industry Classification System. This is used to classify business establishments for collecting, analyzing, and publishing statistical data related to the U.S. business economy. This is Excel Column (47).
SIC_Code	String	Input	This is the SIC Code of the Contact. SIC stands for Standard Industrial Classification. It is used for classifying industries by a four-digit numeric code. SIC is used by government and private agencies to classify industry areas. This is Excel Column (48).
FY_End	String	Input	This is the Fiscal Year End for the Contact. It is used by the government for accounting. This is Excel Column (49).
Annual_Rev	String	Input	This is the Annual Revenue of the Contact. This is Excel Column (50).
Facebook_Link	String	Input	This is the Facebook Link of the Contact. This is Excel Column (51).

Twitter_Link	String	Input	This is the Twitter Link of the Contact. This is Excel Column (52).
Company_Facebook	String	Input	This is the Company's Facebook. This is Excel Column (53).
Company_Twitter	String	Input	This is the Company's Twitter. This is Excel Column (54).
Number_Of_Teams	String	Input	This is the number of teams to add to the contact. This is Excel Column (55). E.g. 3
Teams	String	Input	This is the Contact's Primary Team. If there are multiple teams, they must be separated by a comma, and the first team must ALWAYS be primary. The star will ALWAYS be set to black here on the first team, regardless if there are multiple teams. This is Excel Column (56). E.g. West, Global, East
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 user. (eg. <a href="https://tkyjhb8322.trial.sugarcrm.com">https://tkyjhb8322.trial.sugarcrm.com</a> ).
Locate_Email	String	Input	This will read the custom email columns at the end of the row. Set to column 58, it will immediately shift to the next column and read and store the alternate email input, as part of the loop.

## 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

- Both **Primary\_Email\_Address** and **Teams** can have multiple test cases. There is a difference in code however, since only ONE locator column code can be used; the rest MUST be done by delimiters.
  - o **Teams** are done by delimiters because the inputs are much shorter than emails. The Primary Team must ALWAYS be the first among the commas; there is no code that will recognize any other team in succession as a Primary Team. The web page only allows one Primary Team, **and the first Team is set to Primary by default**. Additional code to specifically check for each team to determine whether that specific team is primary is not necessary. Do not put more than one primary team, and **do not put any Primary Team after the first comma**.
  - o Email Addresses are be done by excel locator code instead of delimiters, because each email address can be very long. Too many long email addresses added to a single column is difficult to do, and would look bad on the excel sheet. The **Primary\_Email\_Address** will always have an input that is a Primary email address. Subsequent email addresses are secondary and will **not have code to check for Primary Teams. Do not put any Primary Email addresses in these columns**. There web page only checks one Primary Team, so it is not necessary to add complex code to check for each email address to determine which one is the Primary Email Address.
- If the Number\_of\_Emails 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\_Email**. 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 Email

column, so the Number\_Of\_Email must equal to 2. If the value does not match the correct total amount columns used, there may be errors in automating.

- Make sure your Portal Name is unique for each contact. Ensure that your inputted Portal Name does not exist in the directory.
- Copy\_Primary is an important Yes or No input that will determine if the Primary Address Fields are to be copied over to the Alternate Address Fields, which is decided if Copy\_Primary is equal to Yes. If Copy\_Primary is equal to No, the Alternate Address Fields are overwritten. The Primary Address Fields are as follows:
  - The Primary\_Address is the street address or main location address. It is required that the address has less than 35 characters, as part of the international standard. If Alt\_Address is to be used, there is code that will be used to erase the copied Primary Address from the Alternate Address field. This requires backspacing 36 times, if there are characters beyond that, it will not be able to erase it, and the leftover character will be included with the Alternate Address keystroke.
  - Primary\_City is the main city address.
  - Primary\_State is the main state address.
  - Primary\_Postal\_Code is the main Postal or Zip code of the location.
  - Primary\_Country is the country of the main address.
- Some excel inputs must exist within the SugarCRM Directory, and they must be spelled correctly; otherwise, errors will occur. Here are the following inputs that must follow these two requirements:
  - Account\_Name
  - Reports\_To
  - Lead\_Source
  - Assigned\_To
  - Campaign
  - Language
- The following are phone number fields:
  - Mobile
  - Office\_Phone
  - Fax
  - Assistant\_Phone
- The Phone Number fields should have the following format: +1 – xxx – xxx – xxxx. With excel, this may be difficult as it may read the + sign as an excel function. To avoid this, **press Tab or Enter** once you are finished with the cell, but **do not mouse click other cells as you input the phone number format**.
- The following are URL fields:
  - Company\_Website
  - Facebook\_Link

- Twitter\_Link
- Company\_Facebook
- Company\_Twitter
- These URL fields on the Contact page will add https:// to the input fields if they do not already have https:// as an input. It is recommended you make your URL as accurate as possible.
- **Second\_Name** is a **mandatory field**. You **MUST** have this field, or the web page will not be created and saved, and the program will fail.
- Industry\_Tags can have as many tags as you want, without worrying about code.
- Some fields can be omitted, the program will run fine, and the web page will save.
- Make sure that there are no duplicate contacts in the input file, or the program will error out.

A	B	C	D	E	F	G	H	I	J
Salutation	First_Name	Last_Name	Title	Mobile	Department	Call	Account_Name	Number_Of_Email	Primary_Email_Address
Dr.	Ennio	Colon	Computer Engineer	+1 - 305 - 444 - 5000	IT Department	No	Tortoise Corp	4	<a href="mailto:ennio.colon@peopleshores.net">ennio.colon@peopleshores.net</a>
Ms.	Barbara	Nguyen	Process Manager	+1 - 305 - 500 - 8999	HR Department	Yes	X-Sell Holdings	2	<a href="mailto:ennio.colon@peopleshores.net">ennio.colon@peopleshores.net</a>

  

K	L	M	N	O	P	Q	R	S	T
Tags	Primary_Address	Primary_City	Primary_State	Primary_Postal	Primary_Country	Copy_Primary	Alt_Address	Alt_City	Alt_State
Ennio, Peopleshores, Colon, Mouse	1500 Almeden st	San Jose	California	94000	United States	No	1600 sw 200th st	Orlando	Florida
Ennio	16111 sw 180th ct	Miami	Florida	33000	United States	Yes			

  

U	V	W	X	Y	Z	AA	AB	AC	AD
Alt_Postal_Code	Alt_Country	Office_Phone	Fax	Assistant	Assistant_Phone	Description	Reports_To	Sync_Mail	Lead_Source
4000	Korea	+1 - 800 - 555 - 4500	+1 - 999 - 444 - 5555	Eduardo	+1 - 305 - 400 - 8000	This is Ennio's current contact.	Alexa Holiday	No	Employee
		+1 - 305 - 333 - 4000	+1 - 600 - 300 - 2000				Alexa Holiday	Yes	

  

AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN
Assigned_To	Campaign	Language	Portal_Name	Portal_Active	Password	Company_Website	Education	Education_Additional	Previous_Jobs
Jim Brennan	Spring Tradeshow	English	E-Portal	No	Puppy	peopleshores.net	Florida International University	Network+	Mobile Apps
Charles James	Spring Tradeshow	English (UK)	Ennio	Yes	Easy	ennioOligarchy.net	MIT		McDonalds, Bank of America

  

AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX
Company_Size	Industry	Company_Location	Company_Description	Year_Founded	Industry_Tags	NAICS_Code	SIC_Code	FY_End	Annual_Rev
30	Android	150 Charcot Avenue	This is a career outsourcing company.	2016	Peopleshore, Ennio	555531	1234	2019	50000000
1000	Accounting	1200 imaginary street	This is a non-existent imaginary company.	1950	Ennio	999999999	9876	2024	10000

  

AY	AZ	BA	BB	BC	BD	BE	BF	BG
Facebook_Link	Twitter_Link	Company_Facebook	Company_Twitter	Number_Of_Teams	Teams	Email_2	Email_3	Email_4
<a href="http://EnnioColon.com">EnnioColon.com</a>	@enniocolon	Peopleshores	@PeopleShores_US	3	West, Global, East	<a href="mailto:steven@universal.com">steven@universal.com</a>	<a href="mailto:ennio.colon@hotmail.com">ennio.colon@hotmail.com</a>	<a href="mailto:ollie.deeley@peopleshores.net">ollie.deeley@peopleshores.net</a>
<a href="http://Barbara.com">Barbara.com</a>	@Nyguen_Barbar	ennio.com	@Ennio_US	1	West	<a href="mailto:spielberg@universal.com">spielberg@universal.com</a>		

# Bot Deployment

