

Create Lead 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_Lead_SugarCRM_Inputfile.xlsx** and creates a new Lead in SugarCRM, for every row in the excel file, using the Sugar CRM's – Senior Sales Representative 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 LEAD 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 LEAD SugarCRM - PEOPLESORES (Folder)
 - Error Folder
 - o Logs (Folder)
 - o Snapshots (Folder)
 - InputFiles
 - o Create_Lead_SugarCRM_Inputfile.xlsx
 - My Tasks
 - o Create_Lead_SugarCRM.atmx
 - Create Lead SugarCRM-PeopleShores-ReadMe

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 Lead, 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 Lead. This is Excel Column (2).
Last_Name	String	Input	This is the Last Name of the Lead. This is a mandatory field. This is Excel Column (3).
Title	String	Input	This is the Title of the Lead. This is Excel Column (4).
Website	String	Input	This is the Website of the Lead. You do not need to put HTTPS//. This is Excel Column (5).
Mobile	String	Input	This is the Lead Mobile Phone number. The format should be +1 – xxx – xxx – xxxx. This is Excel Column (6).
Call	String	Input	Call is either Yes or No. This will determine if the Lead 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 Lead. 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 Lead can have multiple emails. This column indicates how many email addresses will be added to the Lead's business card. This is Excel Column (9). E.g. 4
Primary_Email_Address	String	Input	This is the Lead'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 MUST be the primary choice. This is Excel Column (10).
Tags	String	Input	This is the Lead'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 Lead. 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 Lead. This is Excel Column (13).
Primary_State	String	Input	This is the Primary State Address of the Lead. 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 Lead. This is Excel Column (15).
Primary_Country	String	Input	This is the Primary Country of the Lead. (ex. United States) This is Excel Column (16).
Annual_Rev	String	Input	This is Annual Revenue of the Lead. This field is automatically reused later by the new Lead page functionality. This is Excel Column (17).
Department	String	Input	This is the Lead's Department. This is Excel Column (18).
Company_Size	String	Input	This is the Lead's Company Size. This field is re-used. This is Excel Column (19).
Lead_Score	String	Input	This is the Lead's score. This is Excel Column (20).
Company_Description	String	Input	This is the Lead's Company Description. This field is automatically re-used later on. This is Excel Column (21).
Campaign	String	Input	This is the Lead's Campaign. This is Excel Column (22).
Industry	String	Input	This is the Lead's Industry. This is Excel Column (23).
Description	String	Input	This is the Lead's Description. This is Excel Column (24).
Status	String	Input	This is the Lead's Status. There are only 5 acceptable inputs: New, Assigned, In Process, Recycled, and Dead . If this value is left blank, the Status is set to NEW as default. These should be the only inputs allowed, or there will be an error. This is Excel Column (25).
Status_Description	String	Input	This is the Description of the Lead's current Status. It can be left blank if the Status is left Blank. This is Excel Column (26).
Lead_Source	String	Input	This is the Lead's Source. The input needs to exist in the SugarCRM's directory, and the spelling must be exact. This is Excel Column (27).

Lead_Source_Description	String	Input	This is the Lead's Source Description. This is Excel Column (28).
Assigned_To	String	Input	This is the name of the person that the new Lead is assigned to. The input needs to exist in the SugarCRM's directory, and the spelling must be exact. This is Excel Column (29).
Opportunity_Amount	String	Input	This is the Opportunity Amount to the new Lead. This is Excel Column (30).
Number_Of_Teams	String	Input	This is the Number of Teams to add to the Lead. This is Excel Column (31).
Teams	String	Input	This is the Lead's Company Website. This is the Lead'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 (32). E.g. West, Global, East
Education	String	Input	This is the Education of the Lead. This is Excel Column (33)
Education_Additional	String	Input	This is the Additional Education of the Lead. This is Excel Column (34)
Previous_Jobs	String	Input	This is the Additional Jobs of the Lead. This is Excel Column (35).
Company_Location	String	Input	This is the Lead's Location of the Company. This is Excel Column (36).
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 (37).
Industry_Tags	String	Input	This is the tags for the Industry of the Lead. There can be multiple tags in the same column. This is Excel Column (38).
NAICS_Code	String	Input	This is the NAICS Code of the Lead. 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 (39).
SIC_Code	String	Input	This is the SIC Code of the Lead. 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 (40).

FY_End	String	Input	This is the Fiscal Year End for the Lead. It is used by the government for accounting. This is Excel Column (41).
Facebook_Link	String	Input	This is the Facebook Link of the Lead. This is Excel Column (42).
Twitter_Link	String	Input	This is the Twitter Link of the Lead. This is Excel Column (43).
Company_Facebook	String	Input	This is the Company's Facebook. This is Excel Column (44).
Company_Twitter	String	Input	This is the Company's Twitter. This is Excel Column (45).
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_Email	String	Input	This will read the custom email columns at the end of the row. Set to column 45, 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

- Make sure there are no existing leads in the SugarCRM directory on the input file.
- 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.
 - **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**.
 - 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.
- 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:
 - Campaign
 - Lead_Source
 - Assigned_To
- The following are URL fields:
 - Company_Website
 - Facebook_Link
 - Twitter_Link
 - Company_Facebook
 - Company_Twitter

- These URL fields on the Lead 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.
- Make sure that there are no duplicate Leads 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	Website	Mobile	Call	Account_Name	Number_Of_Email	Primary_Email_Address
Dr.	Ennio	Colon	Computer Engineer	DisasterRelief.org	+1 - 305 - 444 - 5000	No	Tortoise Corp	4	ennio.colon@peopleshores.net
Ms.	Barbara	Nguyen	Process Manager	SalesQuery.com	+1 - 305 - 500 - 8999	Yes	X-Sell Holdings	1	ennio.colon@peopleshores.net
K	L	M	N	O	P	Q	R	S	T
Tags	Primary_Address	Primary_City	Primary_State	Primary_Postal_Code	Primary_Country	Annual_Rev	Department	Company_Size	Lead_Score
Ennio, Peopleshores, Colon, Mouse selling	1500 Almeden st	San Jose	California	94000	United States	500000000	IT power cabling	1000	50000
	16111 sw 180th ct	Miami	Florida	33000	United States	10000	Sales	40	4000
U	V	W	X	Y	Z	AA	AB	AC	AD
Company_Description	Campaign	Industry	Description	Status	Status_Description	Lead_Source	Lead_Source_Description	Assigned_To	Opportunity_Amount
This is a career outsourcing company.	Spring Tradeshow	Android	This is Ennio's current contact.	Assigned	Throw away your cans	Employee	No	Jim Brennan	3
This is a non-existent imaginary company.	Spring Tradeshow	Accounting			+1 - 305 - 400 - 8000		Yes	Charles James	2
AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN
Number_Of_Teams	Teams	Education	Education_Additional	Previous_Jobs	Company_Location	Year_Founded	Industry_Tags	NAICS_Code	SIC_Code
3	Global, West, East	Florida International University	Network+	Mobile Apps	150 Charcot Avenue	2016	Peopleshore, Ennio	555531	1234
1	West	MIT		McDonalds, Bank of America	1200 imaginary street	1950	Ennio	99999999	9876
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				

Bot Deployment

