

LEAD MANAGEMENT PROCESS

Bot Overview

This bot performs the following:

- The bot identifies and reads the email from the lead suppliers (e.g. India-Mart/Just-Dial) with specific subject line that will contain the client lead information in the body of the email.
- Bot extracts the client data from email and store into an excel sheet in a structured format.
- Opens excel which contains the business development manager information specific to regions.
- It then matches the content of the client details to identify which BDM is to be assigned based on the location.
- Sends introductory email to the client based on the extracted data from email and CC's the relevant BDM.

Prerequisites

- Automation Anywhere Community Edition v11.3.3.0

Installation

- Download the bot from Bot Store.
- Double click on <Bot Name>.msi and follow the installation instructions. For first time users, the "Bot Store" folder is created under <AA Directory>/My Tasks (on your local disk).
- **Installer creates the following folder structure with content under the <AA Directory>**

Creates the following folder structure of the content in the AA Dir:

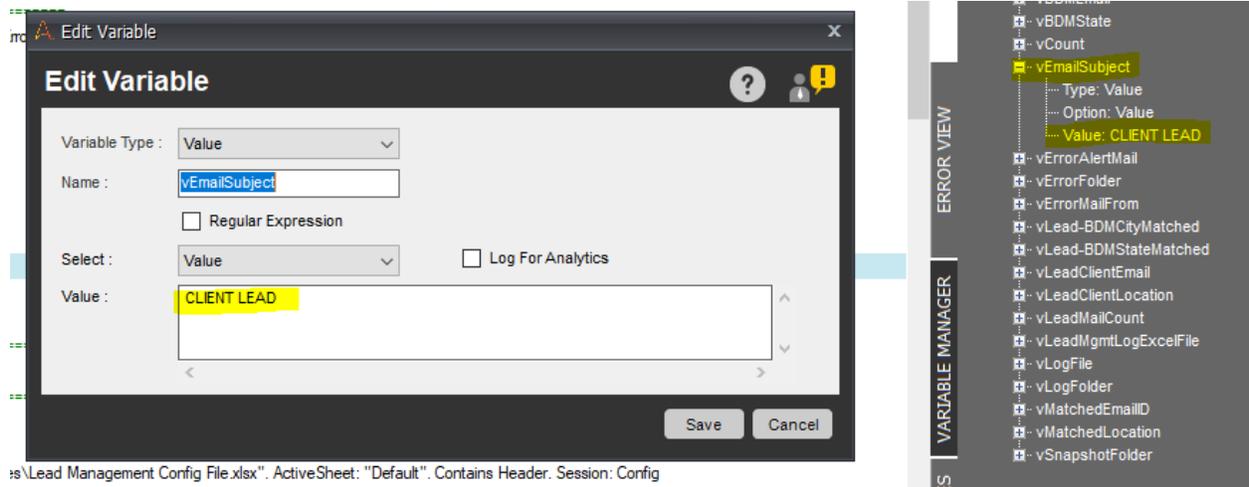
- <AA Directory>
 - o My Tasks
 - Bot Store
 - Parent Folder-AA (Process Name)
 - o My Tasks (Folder)
 - [Process Name]. atmx
 - o My MetaBots (Folder)
 - N/A
 - o Log Folder
 - Log-dd-mm-yyyy.txt
 - Log-dd-mm-yyyy.xls
 - o Input Folder
 - BDM Mapping List (BDM-Location Mapping file)
 - Lead Management Config File (Contain list of all the input file with their path)
 - o Error Folder (Folder)
 - Logs (Folder)
 - Error Logs Month-Day-Year-Hr-Min-Sec.txt
 - Snapshots (Folder)
 - Error Snap Month-Day-Year-Hr-Min-Sec.png

How to Use the Bot:

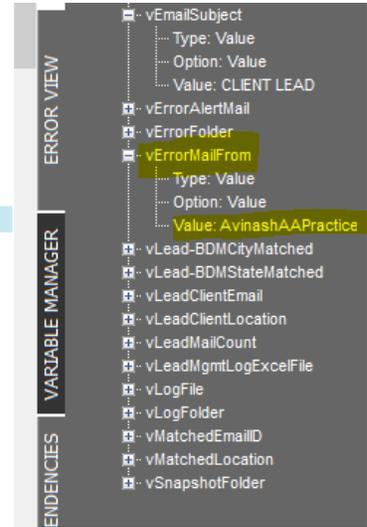
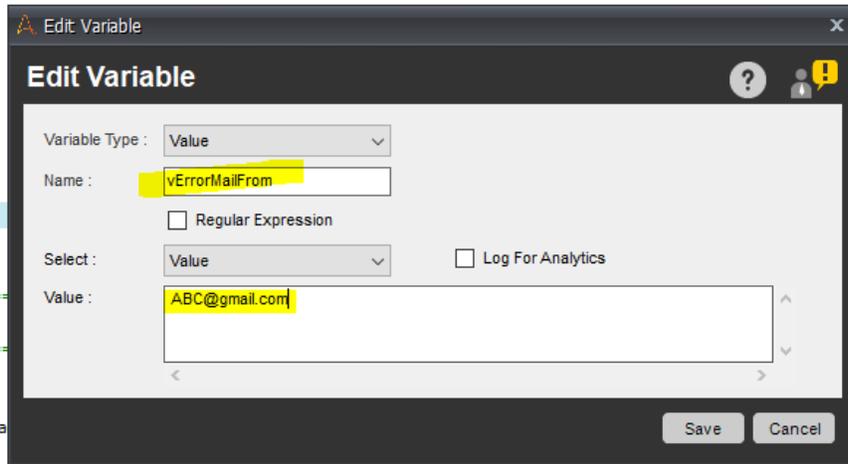
Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
vErrorFolder	String	Input	This is error folder inside bot folder which contains Logs and Snapshots folder (Already defined, no need to add value unless want to change location of file).
vLogFolder	String	Input	This folder contains Log file in case of error (Already defined, no need to add value unless want to change location of file).
vSnapshotFolder	String	Input	This folder contains Screenshot in case of error (Already defined, no need to add value unless want to change location of file).

- Go to variable manager, select vEmailSubject and provide the value to be search in Email unread mail.



- Go to variable manager, select vErrorMailFrom from which you want to sent email incase of success and failure of the process.



- The BDM mapping file will contain the mapping of the BDM – Location from where we can find out the which BDM is to be assign the lead based on the location.

	A	B	C	D
1	Name	City	State	Email Address
2	UserA	New Delhi	Delhi	ABC@gmail.com
3	UserB	Mumbai	Maharashtra	PQR@gmail.com
4				

- The config file (Lead Management Config File) will save the name and path of the of the required files in Column A and B respectively.

	A	B
1	File Name	Path
2	BDM Mapping List	C:\Users\██████████\OneDrive - ██████████\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Lead Management Process - ██████████\Input Folder\BDM Mapping List.xlsx
3	Lead Management Log Excel File	C:\Users\██████████\OneDrive - ██████████\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Lead Management Process - ██████████\Log Folder
4	Lead Management Log File	C:\Users\██████████\OneDrive - ██████████\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Lead Management Process - ██████████\Log Folder
5	Error Alert	ABC@GMAIL.COM

- Sample Lead Email content coming from lead suppliers

CLIENT LEAD EMAIL FOR [REDACTED] Inbox x



[REDACTED]@gmail.com
to [REDACTED]

AUTOMATION ANYWHERE TEST EMAIL KINDLY IGNORE THIS EMAIL AND DO NOT REPLY

Dear Sir/Madam

Warm geetings from XYZ

Hi Tech [REDACTED]

Below are the client details who are visited on your company profile and enquired about the products.

Client Info,Details

Name,ABC Solutions pvt ltd

Enquired Product,Automation Anywhere Enterprise RPA

Location,New Delhi

Contact No,986547663

EmailID,AvinashAAPractice@gmail.com

Thanks & Regards

XYZ



Please **consider the environment** before printing this email.

Error Handling

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