



A2019 Sales Force + Bot Insight Bot Readme

Version 1.0
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Table of Contents

| | |
|--|----------|
| 1. Introduction | 3 |
| 1.1 Overview..... | 3 |
| 1.2 Use Cases..... | 3 |
| 2. Requirements & Prerequisites | 4 |
| 2.1 System Requirements | 4 |
| 2.2 Prerequisites..... | 5 |
| 3. Getting Started..... | 6 |
| 3.1 Quick Start..... | 6 |
| 3.1.1 Setup..... | 6 |
| 3.1.2 Configuration..... | 6 |
| 4. Support & FAQs..... | 7 |
| 4.1 Support..... | 7 |
| 4.2 FAQs..... | 7 |
| Appendix A: Record of Changes..... | 8 |
| Appendix B: References..... | 9 |

1. Introduction

This document contains all essential information for the user to make full use of this Enterprise A2019 Bot. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

It reads the data from CSV file generated using python and Salesforce.
Loop through all Account wise Actual Value Amount and sort the data based on their ACV Value.
It will generate Dashboard using Bot Insight Analyze Command
I am attaching the screenshot of the code and result of the dashboard in this email.

1.2 Usecases

The primary use case for this bot is a tool for getting Actual Value amount from total accounts from the account manager and customer success manager. It will also group the total actual value amount for the individual account manager.

2. Requirements & Prerequisites

2.1 System Requirements

Below are the minimum system requirements for running bots as an Enterprise A2019 (cloud-deployed) or Community Edition user on your local machine.

Hardware Requirements

| Device | Processor | RAM | Storage (Free Space) | Network |
|----------------------------|--|--|---|--|
| Machine | Intel Core i5 2.6 GHz | 4 GB minimum 8 GB recommended | 32 GB | 1 GbE |
| Bot Creator and Bot Runner | No additions to the machine requirements | No additions to the machine requirements | Add 100 through 150 KB per Automation Anywhere script Add 40 through 50 GB per long-term project | No additions to the machine requirements |

Browser Requirements

The user interface for Automation Anywhere Enterprise is through a browser. Login to your device then login to Enterprise Control Room through a browser.

| Browser | Browser Version | Automation Anywhere plug-in version ² | Supported bot functions by Bot agent version | | |
|-----------------------------|-----------------|--|--|---------------|-----------------------------|
| | | | 2.0.2 | 1.0.2 | 1.0.1 |
| Google Chrome ¹ | 57 or later | 11 or 12 | 2.0.2 | 1.0.2 | 1.0.1 |
| Microsoft Internet Explorer | 11 | N/A | None | Debugger only | All except Credential Vault |

(1) Google Chrome re-verification

CAUTION: Google Chrome requires re-verification of permissions when the Automation Anywhere Google Chrome extension (Version 11.3.3 or later) is updated. If prompted, click **Enable this item** in the Google Chrome message. Alternatively, re-enable the extension through [chrome web store](#). Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.

(2) Google Chrome plug-in versions

A2019 supports Chrome plug-in version 11. If you have other versions installed, you might not be able to record tasks using the Record feature or Capture action. To resolve this issue, do the following:

1. Rename the automation.chrome.agent registry key to automation.chrome.agent.old. The registry key is available at: Computer\HKEY_CURRENT_USER\Software\Google\Chrome\NativeMessagingHosts
2. Disable all other Google Chrome plug-in versions you have installed, except for version 11.

2.2 Prerequisites

This Bot utilizes Enterprise A2019 and the Bot Insight Analytical Tool. It is also getting data from Salesforce using Python Script. Python should be installed into your local hard drive.

3. Getting Started

3.1 Quick Start

3.1.1 Setup

Once the bot execute it will generate CSV file that contains account wise actual value amount data with account owner and name of the customer success manager as well.

3.1.1.1 Bot Insight

Bot Insight must be properly installed and configured to be able to generate dashboard that is to be built using CSV data.

3.1.1.2 Chrome Browser

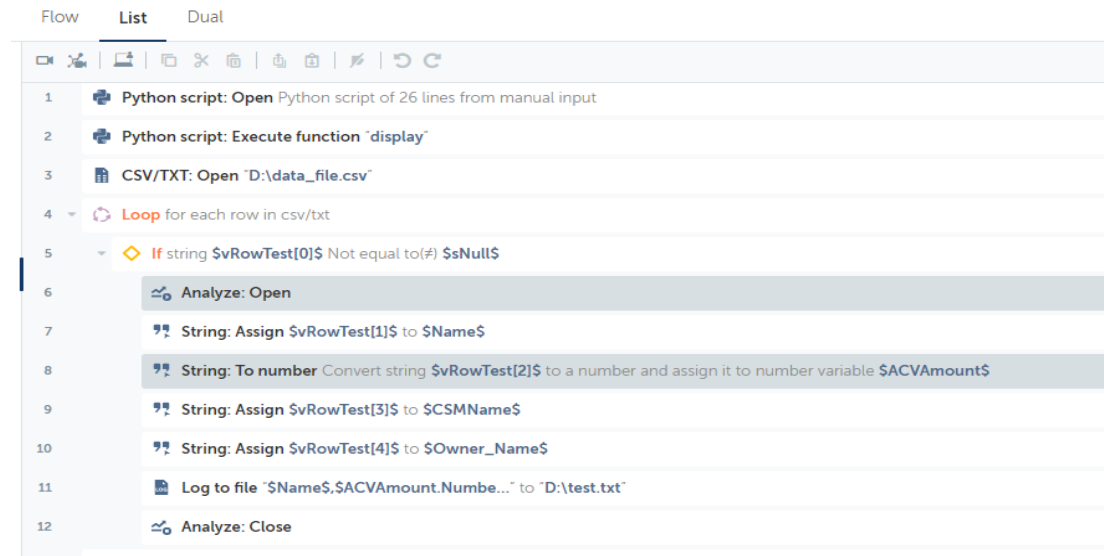
This bot operates with the Chrome browser. This must be installed on the bot runner machine, and the store searches specified above must happen in the Chrome browser, for the store searches to work properly.

3.1.2 Configuration

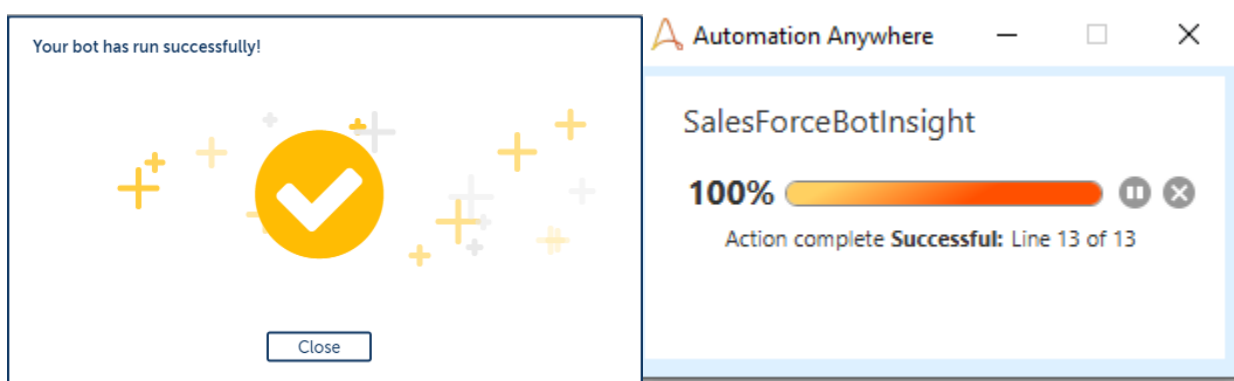
No configuration is required for this bot.

Sample Screenshots:

SalesForceBotInsight

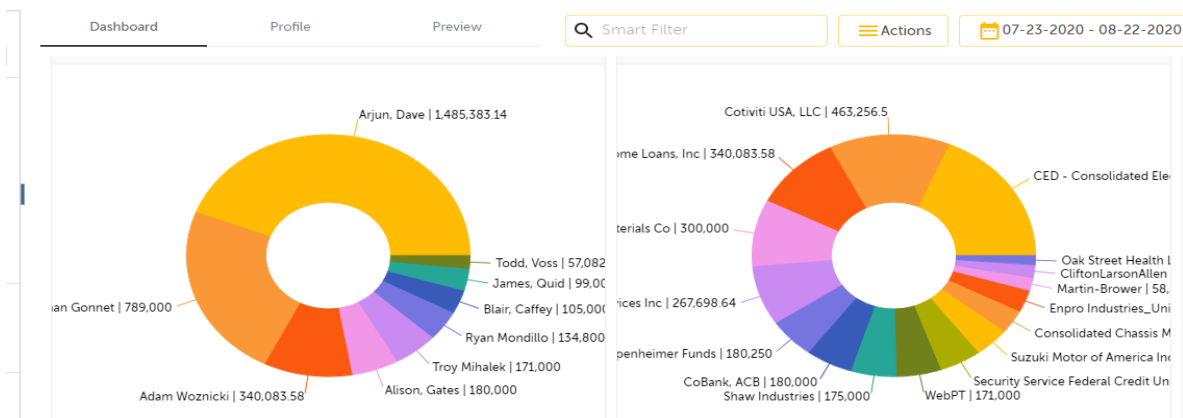


This is how the bot was built.



This is how the Bot works.

This shows the Dashboard based on the data provided inside of CSV File



4. Support & FAQs

4.1 Support

Free bots are not officially supported by Automation Anywhere. However, you can get access to Community Support through the following channels:

- CommunitySupport, connecting with other Automation Anywhere customers and developers on [APeople](#).
- Automation Anywhere's [Product Documentation portal](#), which provides more information about our products as well as for guidance on [Enterprise A2019](#).

4.2 FAQs

Q: Can I make changes to this bot?

A: Absolutely. Free bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

Q: How can I change the output format of the bot?

A: When calling a subtask, the return value is always of type dictionary, and the value(s) returned from the subtask can be accessed through their specific variable names as a key within the dictionary.

For questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#).

Appendix B: References

| No. | Topic | Reference Link |
|-----|--|----------------------------|
| 1 | Overview of Enterprise A2019 | Click here |
| 2 | Guidance: Building basic A2019 bots | Click here |
| 3 | Guidance: Building A2019 action packages | Click here |
| 4 | APeople Community Forum | Click here |
| 5 | Automation Anywhere University | Click here |