



Celebrating 20 Years

# Salesforce Connector –Readme

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## Bot Overview

Salesforce is a leading provider of customer relationship management (CRM) platform. This Salesforce connector utility packages function for around 52 activities to perform various operations such as add, delete, update, or retrieve (ADD, DELETE, UPDATE, or GET) on different objects from Salesforce. With the current version we have prioritized entities **ACCOUNT, ASSET, CASE, CONTACT, LEAD, Campaign, FILE, OPPORTUNITY, TASK, PRICEBOOK, PRODUCT, QUOTE**. Users can perform any of the listed operations by providing required arguments just in few steps as users just need to consume the Metabot from their existing AA workflow. Users can create a customized flow of the Salesforce operations by using the Metabot functions. If the object name is different from the listed objects, User can use the CustomObject Metabot functions to perform the desire operation-for that user will need to provide object type in input.

## Pre-Requisites

- Automation Anywhere Enterprise v11.x

## Installation

- Download the bot from Bot Store.
- Double click on the .msi file.
- On Welcome to Installation wizard, click Next to continue.
- Click I agree to the terms in the license agreement radio button to accept the agreement.
- Get/Copy the License key from Bot Store Downloads into License Key, click Next to continue.
- Click Install to begin the installation.
- Click Finish to complete the installation.
- To view the installation, go to 'My Tasks' folder on AAE Client to see bot files.

## Uninstall

- Open Add/Remove Programs
- Select the Bot/Digital Worker to be installed.
- Click uninstall.

## Create the following folder structure of the content in the AA Dir:

- <AA Application Path>
- My Tasks
  - Bot Store
    - ServiceNow-Connector
      - My Task
      - My Metabots
        - Salesforce-Connector
      - Error Folder
        - Logs (Folder)
          - Error Logs Month-Day-Year.txt (Configurable parameter provide by user in Dictionary variable key "AuditLogFile" and "ErrorLogFile")

## How to Use the BOT?

- All the Salesforce Metabot logics expect one dictionary type variable argument, that must have below keys-
  - I. Client\_Id
  - II. Client\_Secret
  - III. GrantType
  - IV. AuditLogFile
  - V. ErrorLogFile
  - VI. Record\_Id – (Value should be provided according to the function.)
  - VII. JsonParameters – (Value should be provided according to the function.)
  - VIII. UserName- (Salesforce username.)
  - IX. Password- (Salesforce Password.)
  - X. Security token – (This is the mandatory field; the security token can be generated by salesforce instance)

### Key Details-

- **Client\_Id**- The client ID can be generated by Connected-APP in Salesforce; the consumer key is Client\_Id.
- **JsonParameters**- This contains the attributes of the salesforce entity in the json format, that user want to send as the request body of rest API. The Json string must be relevant to the Metabot function.
- **Record\_Id** – Unique ID of the Salesforce entity.
- **Client\_Secret**- The Client Secret can be generated by Connected-APP in Salesforce; the consumer secret is “Client\_Secret”.
- **UserName**- Salesforce user name.
- **Password**- Salesforce password.
- **Security Token**- This is the mandatory field; the security token can be generated by salesforce instance.

## Generate Security Token –

On the salesforce portal, Go to Home → Settings → search for “Token” in search panel → Reset my security token → click the Reset Security Token.

Salesforce system will send the Security Token to the registered email ID. User will have to pass the security token in “Security Token” key in the dictionary type variable.

- **List of the common parameters for all the Metabot functions.**
  - I. Username
  - II. Password
  - III. SecurityToken
  - IV. AuditLogFile
  - V. ErrorLogFile
  - VI. Client\_Id
  - VII. Client\_secret

In the Utility package we have introduced one **sample bot** that shows how to use Salesforce Metabot to perform operation, here we have Incident CRUD operations on Salesforce entities.

- List of the Sales force entities upon which the bot will perform the ADD, Update, Get and Delete operations-
  1. ACCOUNT
  2. ASSET
  3. CASE
  4. CONTACT
  5. LEAD
  6. Campaign
  7. FILE
  8. OPPORTUNITY
  9. TASK
  10. PRICEBOOK
  11. PRODUCT
  12. QUOTE
- **Important notes:** -
  - a. To retrieve an entity, user needs to provide “entity Id” in “Record\_Id” Key in Dictionary variable to the GET Metabot logic, along with common parameters.
  - b. To create new record for an entity user needs to provide all the entity parameters in Json format (i.e. {” Description”: “Description for the entity”}- JsonParameters key in the Dictionary type variable) along with common parameters.
  - c. To updated certain entity user needs to provide update parameters in Json format along with unique id of the entity (Record\_Id key in the Dictionary variable) along with common parameters.
  - d. To Delete an entity user needs to provide “entity Id” in “Record\_Id” Key in Dictionary variable to the GET Metabot logic (Record\_Id key in the Dictionary variable) along with common parameters.

**Note:** if user has some different salesforce objects that are not listed in the above section then user can use the below Metabot logics to perform certain operations-

- 1) Create\_CustomObject
- 2) Get\_CustomObject
- 3) Update\_CustomObject
- 4) Delete\_CustomObject

To use the above logics, user will need to provide the Object name in the “ObjectType” key in the dictionary type variable along with other parameters.

## Error Handling

- The automation captured all the exceptions and logged those exceptions. Bot stored follows the below-mentioned hierarchy to store details of the exceptions.
  - **Error Folder**
    - **Logs:** The configurable parameters provided by the user in the Dictionary variable Keys- “AuditLogFile” and “ErrorLogFile”.