



A2019 – Payment Reminder Bot - Cross Sell using DMN and Twilio

Readme

Version 1.0

2/17/2021

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1. Introduction

This document contains all essential information for the user to make full use of this Payment Reminder Bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the bot.

1.1 Overview

A2019 Payment Reminder Bot - Cross Sell using DMN and Twilio API bot can be used to send out payment reminders to customers and cross-sell additional subscriptions.

Use cases

The key use cases include:

- Payment reminders
- Shipping updates
- Marketing promotions

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

- Automation Anywhere Enterprise A2019 setup to run in your machine.
- This bot uses the following Custom packages available on Bot Store:
 - [A2019 - Camunda DMN Package](#)
 - [A2019 - Twilio Integration Package](#)
- Prior to use of this Bot, a Twilio account trial or paid, needs to be established for the creation of an SID, Auth Token, and establishing an outbound SMS and voice call number. (again, all outlined in the Quick Start section of this guide)
- Camunda Modeler
- Download the Camunda DMN rules file (required to run this Bot) from [here](#). Unzip the folder and store the file in your local system and configure the Bot to refer to the correct folder in your system.

3. Getting Started

3.1 Quick Start

3.1.1 Setup

For details on Camunda DMN rules file and how to use the package, please refer to this [document](#).

Twilio

The package is dependent on the Twilio Platform. If you don't already have a Twilio account, set up a trial account here: [Sign up for a free trial account here: https://www.twilio.com/docs/usage/tutorials/how-to-use-your-free-trial-account](https://www.twilio.com/docs/usage/tutorials/how-to-use-your-free-trial-account)

You'll need several pieces of data from the Twilio platform which will be mapped as mandatory input for the package to work properly.

1. SID Twilio String Identifier:
 - a. Refer to this page on what an SID is and how to access yours on your trial/full account: <https://www.twilio.com/docs/glossary/what-is-a-sid>
2. Twilio Auth Token:
 - a. Refer to this page on how to access or change your Auth Token: <https://support.twilio.com/hc/en-us/articles/223136027-Auth-Tokens-and-How-to-Change-Them>
3. From Number:
 - a. With a Twilio paid account, you actually buy an outgoing number that's used to send and receive text messages and place voice calls
 - b. For trial accounts, the number you can use for outbound messages can be found here: <https://www.twilio.com/console/sms/getting-started/build>
 - i. Note: on trial accounts, all messages are prefixed with something like "Trial message from Twilio:" – this wouldn't appear when an account is upgraded beyond trial.
4. To Number:
 - a. On a trial account, you can only send text messages and place voice calls to confirmed phone numbers (presumably your own)
 - i. Be sure to verify your number with Twilio before attempting to send a test message. Use the following page to send yourself a test message before using the bot to send a message: <https://www.twilio.com/console/sms/getting-started/build>

- b. On a full account, you can send text messages and place voice calls to any number that Twilio supports.

3.1.2 Configuration and Use

Update the following variables while setting up the Bot or pass the values while initiating the Bot run.

INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandatory	Purpose	Example Input
cSID	Credential	Yes	Twilio String Identifier – see link above on where to access	AC87b6cfa2b18e82af283XXXXc6e8609e (This isn't a real one, but they are similar to this format)
cAuth	Credential	Yes	Authorization Token required for sending a message	7e8d7394acbc954d6d9d7ac19fa42cb (again, not real, but similar format)
sToNumber	String	Yes	The number you intend to send a message to. Must be a string, and must be prefixed with the country code.	19372416946 (sample)
sFromNumber	String	Yes	The number you are sending a message from. Must be a string, and must be prefixed with the country code	12152416946 (Sample)

sMessageBody	String	Yes	Message body being sent as a text – can be combination of literal characters and or variables. (For SMS)	This is the value stored in the column H in the input template spreadsheet
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OUTPUT VARIABLES: Output Variables to be mentioned in this Table.				
Variable Name	Type	Mandatory	Purpose	Example Output
sResponse	String	-	The resulting message from the send_message function call. Should be receiving a SID number on success and 'Error message' on error.	7e8d7394acbc954d6d9d7ac19fa42cb (again, not real, but similar format)

Steps:

- Input template should be stored in the location C:\temp, but the bot will place this file if you miss out. Enter Customer Mobile Number in Column B in the spreadsheet:

See the screenshot below to see how the dictionary values are setup to be passed to the DMN engine for processing the rules. Notice the text in the key i.e., membership and preferences

DMN Engine: Evaluate DMN Rules File

Dictionary with input values

Dictionary Variable

Type	String
Key	membership
Value	” \$sMembership\$ (x)

Type	String
Key	preferences
Value	” \$sPreferences\$ (x)

+

Rule Set	” Decision_092ijys (x)
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Rule Results	” lMessage (x)
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To set the text 'membership' and 'preferences' in DMN file, double click on the 'Membership' section highlighted below

CrossSellEngine.dmn x

+

Edit DRD

Open Overview

CrossSell

Hit Policy: Unique

	Membership string	And Preferences string	Then Promotion string
1	"Gold"	"Cricket"	"Get 30% on ColdStar subscription with coupon code CKT030"
2	"Gold"	"Movies"	"Get 30% on BlockFlix subscription with coupon code BLKFIX030"
3	"Gold"	"Food"	"Get 30% on Swizato subscription with coupon code SZT030"
4	"Silver"	"Cricket"	"Get 20% on ColdStar subscription with coupon code CKT020"
5	"Silver"	"Movies"	"Get 20% on BlockFlix subscription with coupon code BLKFIX020"

As seen in the screen below, matching text is added in the Input variable field.

CrossSell		Hit Policy: Unique
	Membership	
	Expression	
1	<input type="text" value="enter expression"/>	
	Expression Language	
2	<input type="text" value="feel"/>	▼
3	Input Variable	
	<input type="text" value="membership"/>	
4	Type:	
	<input type="text" value="string"/>	▼
5	Predefined Values	
	No values	
	Clear predefined values.	
6		

Similarly you can click on Preferences section and see the value in Input Variable field.

CrossSellEngine.dmn x +

Edit DRD Open Overview

CrossSell Hit Policy: Unique

	When	Preferences
	Membership string	Expression enter expression
1	"Gold"	Expression Language feel
2	"Gold"	Input Variable preferences
3	"Gold"	Type: string
4	"Silver"	

4. Support & FAQs

4.1 Support

Free bots and packages are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and 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.

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

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0.0.0	2/17/2021	Arjun S Meda	Initial version of Bot

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