



**Send Email Requests for Early Inbound or
Additional Time for “Confirmed Late” Orders
in OpsVeda**

Readme

Version 1.0

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1. Introduction

This document contains all essential information for the user to make full use of this A2019 *Send Email Requests for Early Inbound or Additional Time for “Confirmed Late” Orders in OpsVeda* Bot. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

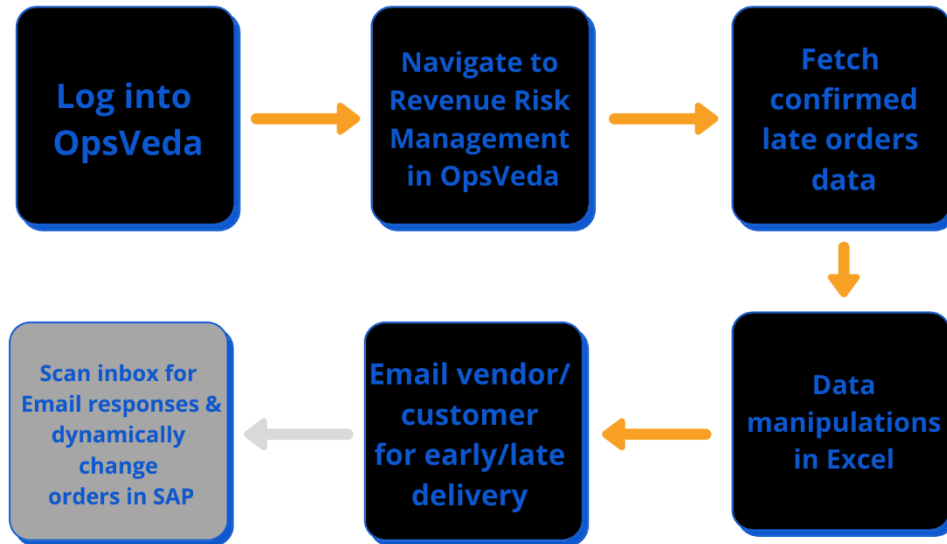
1.1 Overview

The OpsVeda Operational Intelligence system matches customer demand to supply (On hand inventory as well as anticipated deliveries from vendors). The soft allocation is done based on the configured criteria including requested delivery date and customer priority. There will be cases where the system detects that the customer orders cannot be serviced on time because the stock will not arrive early enough from the vendor. On such occasions, the Bot *Send Email Requests for Early Inbound or Additional Time for “Confirmed Late” Orders in OpsVeda* sends email requests to the vendor requesting that the stock be delivered earlier or to the customer requesting for additional lead time.

Detailed Steps:

1. Log into OpsVeda.
2. Navigate to Revenue Risk Management section of OpsVeda and drill-down to the orders that are confirmed to be late. Download the filtered orders to Microsoft Excel.
3. In Microsoft Excel, dynamically filter out orders that are only slightly late, based on the following conditions:
 1. If stock date is more than 20 days in the future but no later than 5 days from requested delivery date, write to vendor asking for an early delivery.
 2. If requested delivery date is more than 14 days in the future, no more than 3 days behind stock date, and sits in the same month as the current month, write to customer asking for a later delivery on stock date.
 3. If both vendor and customer can be requested for early/late delivery, email only vendor.
4. Send out the required emails based on above calculations.

Flow Diagram:



Available separately on Bot Store

Sample Input and Output:

- User Generated Input:** Other than the configuration file (for more details on the configuration file, see section 3.1.2), the bot requires a spreadsheet called **product_category_emails.xlsx** that lists the emails of responsible persons at your customer for each product category in your data, so that we can make sure the right individual receives the emails on the customer's front (this file is only used for customer emails, vendor emails are picked directly from the data). Below is a sample **product_category_emails.xlsx** file:

	A	B
1	Product Category	customer email
2	134	steve@yahoo.com
3	134	brian@hotmail.com
4	122	willsmith@aol.com
5	112	[REDACTED]
6	113	[REDACTED]
7		

- *Intermediate file* (auto-generated by the Bot after OpsVeda Task):

	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Order Stat	Order Risk	Delivery N	Order Rea	Order Rea	Line Reques	Published	Stock Date	Supply PO	PO number	vendor Email	customer email	Today	Stock - To	Stock - LRI	Ask Vendo	LRD - Tr
2	Conf Late	Risk				2021-04-19		2021-04-24	4500019972	988072468	@gme	@gmail.com	01-03-2021	54	5	1	
3	Conf Late	Risk				2021-04-21		2021-04-25	4500019973	988072468	@gme	@gmail.com	01-03-2021	55	4	1	
4	Conf Late	Risk				2021-03-28		2021-03-30	4500019974	988783449	@gme	@gmail.com	01-03-2021	29	2	1	
5	Conf Late	Risk				2021-03-15		2021-03-18	7833554242	7183981	@gme	@gmail.com	01-03-2021	17	3	0	
6	Conf Late	Risk				2021-03-16		2021-03-19	7833550502	5182450	@gme	@gmail.com	01-03-2021	18	3	0	

- *Sample Output*

- Email to Vendor:

Request to Expedite Purchase Order No. 4500019973 by 4 days *** AUTOMATED EMAIL BY OPSVEDA

***  Inbox x



Mon, Mar 8, 6:10 PM (2 days ago)

Dear Vendor,

Can we expedite the delivery of Purchase Order No. 4500019973 by 4 days? Following are the details of the Purchase Order:

PO Number: 4500019973

Material No.: 7841YJI

Item No.: 0070

Quantity: 1

Current Stock Date: 2021-04-25 (We need the order 4 days prior to this date)

Since this is an automated email, please draft your response as such. You only have to change DECISION and NEW DELIVERY DATE (if DECISION is not "NO") values.

*** BEGIN RESPONSE ***

TYPE: VENDOR


DECISION: (YES/NO)

NEW DELIVERY DATE: YYYY-MM-DD

*** END RESPONSE ***

Thank you.

- Email to Customer:

Request to delay delivery of Purchase Order No. 7183981 by 3 days (Internal SO 60481) ***
AUTOMATED EMAIL BY OPSVEDA *** 



Mon, Mar 8, 6:26 PM (2 days ago)

Dear Customer,

Can we delay the delivery of Purchase Order No. 7183981 by 3 days? Following are the details of your Purchase Order:

PO Number: 7183981

Material No.: BLS-0001

Item No.: 0020

Quantity: 12

Internal Sales Doc: 60481

Current Requested Del. Date: 2021-03-15 (Can we postpone this by 3 days?)

Since this is an automated email, please draft your response in the format provided below. You only have to change DECISION and NEW DELIVERY DATE (if DECISION is not "NO") values.

*** BEGIN RESPONSE ***

TYPE: CUSTOMER

DECISION: (YES/NO)

NEW ACCEPTED DELIVERY DATE: YYYY-MM-DD

*** END RESPONSE ***

Thank you.

1.2 Use cases

This bot can be used for:

1. Lost sales avoidance
2. Improved sales operations productivity
3. Increasing agility in supply chain operations

2. Requirements & Prerequisites

2.1 System Requirements

[Enterprise A2019 \(Cloud deployed\) and Community Edition device requirements.](#)

Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an Enterprise A2019 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Software needed:
 - OpsVeda's Operational Intelligence Platform
 - Google Chrome internet browser
 - Microsoft Office Excel
 - Microsoft Outlook

- Accounts needed:
 - OpsVeda Login details
 - Sender Email Address



3. Getting Started

3.1 Quick Start

3.1.1 Setup

Before the bot can be deployed, you need to ensure that you have the following external accesses in place:

- OpsVeda Login details
- Sender Email address

In case you are not a current OpsVeda user or do not have access to OpsVeda (or OpsVeda's demo system) please contact us (<https://opsveda.com/contact/>) so we can help you get set up.

3.1.2 Configuration and Use

Step 1: Setup up Credentials in the A2019 Control Room

In order to keep sensitive information like usernames, passwords, server addresses secure – store all such information in A2019 Control Room's Credential Vault.

Follow the step-by-step instructions below to set up the required credentials for OpsVeda and Sender Email address in the Credentials Vault:

- Make sure the appropriate AA user (a bot runner) has the "Locker Consumer" role assigned to it.
- Create a Locker with the name "Email Main".
- Create the following credentials with the exact names and move them to the "Email Main" locker:



Locker Name	Credentials Name	Attribute Name	Value
<i>Email Main</i>	<i>OpsVeda</i>		Username Password
	<i>Sender Email</i>		ID Password

NOTE: Please make sure both your credential and value names *exactly match* the ones given in the table above.

Step 2: Configure Parameters using an external config_send_email.xml file

config_send_email.xml File Path (Cannot be changed):

C:\ProgramData\AutomationAnywhere\config\config_send_email.xml

NOTE: The config file contains parameters that the bot ingests during runtime. The parameters are user specific and must be configured before the bot is run.

Sample Config File (All fields are mandatory):

```
config_send_email - Notepad
File Edit Format View Help
<?xml version="1.0"?>
<opsveda>
<environment name ="chrome">
    <path>C:\Program Files\Google\Chrome\Application\chrome.exe</path>
    <pathparams>--new-window https://opvcloud.opsveda.com/OpsVeda_new</pathparams>
</environment>
<environment name ="excel">
    <path>C:\Users\██████████\Desktop\BOT\Additions_to_Conf_Late_OV.xlsx</path>
</environment>
<environment name ="email">
    <path>C:\Users\██████████\Desktop\BOT\product_category_email.xlsx</path>
</environment>
</opsveda>
```

Mandatory fields for Configuring the Bot (need to be entered in C:\ProgramData\AutomationAnywhere\config\config_send_email.xml) –

<i>Mandatory Config Fields (config_send_email.xml)</i>		
<i>Environment name</i>	<i>Name</i>	<i>Purpose</i>
<i>chrome</i>	<i>path</i>	Local path to where Google Chrome is installed
	<i>pathparams</i>	<u>DO NOT CHANGE THIS FIELD:</u> Keep default value of: "--new-window https://opvcloud.opsveda.com/OpsVeda_new"
<i>excel</i>	<i>path</i>	Local path to the file downloaded by the bot after executing the OpsVeda RRM step
<i>email</i>	<i>path</i>	Local path to the product_category_emails.xlsx file as described earlier in section 1.1

After completing all of the above steps, you can begin using your Bot!

NOTE: All error logs/snapshots can be accessed at this location on your machine (auto-generated by the bot):

C:\ProgramData\AutomationAnywhere\BotRunner\Logs\SendEmailConfLate-OpsVeda

4. Support & FAQs

4.1 Support

Licensed OpsVeda users, please get in touch with your OpsVeda customer success manager.

You can also directly reach out to support@opsveda.com.

Additional guidance, tips & tricks, and automation capabilities can be found at knowledge.opsveda.com.

Free bots 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

- What if I am not an existing OpsVeda user?
 - To get started, or to learn more about OpsVeda, contact us here (<https://opsveda.com/contact/>) so we can help you get set up.
- I get an error when the Bot tries to manipulate the Excel File before executing the Email task. What can I do?
 - The version 1.0 release of the bot performs excel operations using mouse clicks. You may be running into this issue because of your Microsoft Excel Zoom settings. Please set your default zoom level to 70% and try again.

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	10 th March 2021	OpsVeda	Version 1 Release

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