

A2019 – Salesforce Lead Assistant

README

Version A2019.16

23/10/2020

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1. Introduction

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

Overview

- This Bot login to the Salesforce CRM.
- Read the input data from specific excel sheet (Lead Details.xlsx).
- The Bot will create new Lead and enter the details to the Salesforce CRM.
- The Bot asks user for Converting leads to accounts, contacts, and opportunity.

The key use cases include:

1. Automated Salesforce Lead Creation and Conversion.

Requirements & Pre-requisites

1.1 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.

1.2 Prerequisites

1. Automation anywhere enterprise A2019 installed.

2. Getting Started

2.1 Quick Start

2.1.1 Configuration and Use

OUTPUT VARIABLES: Output Variables to be mentioned in this Table.					
Variable Name	Type	Mandatory	Purpose	Direction	Example Output
sUserName	String	Yes	Salesforce username of the user NOTE: Pls configure your Salesforce username with the required (login credentials.xlsx) "C3" Column	Input	Ex: abc@gmail.com
sPassword	String	Yes	Salesforce password of the user NOTE: Pls configure your username in the required (Credentials.xlsx) "C4" Column	Input	Ex: Abcde
fLoginDetailsPath	File	Yes	File path for the Excel File comprising of username and password of the user.	Input	Provide Output Excel File Location E.g. D:\ExcelFiles Kindly configure this variable with the required location

			NOTE: Pls configure this variable with the required excel file with required Headers.		
fLeadDetails	File	Yes	<p>File path for the Input Leads Details Excel file.</p> <p>NOTE: Pls configure this variable with the required excel file with required Headers.</p> <p>This Excel sheet comprises of Salesforce Leads details of the company or.</p>	Input	<p>Provide Output Excel File Location</p> <p>E.g. D:\ExcelFiles</p> <p>Kindly configure this variable with the required location</p>
sRootLogDirectory	String	Yes	<p>Root directory for creating bot logs - can be customized or left as default</p>	Output	<p>Ex : C:\Automation A2019\Bots\SalesForce Lead Assistant</p>

**Sample Excel files is included in this bot (Control room files)*

Sample file names:

1. Leads Details.xlsx
2. Login Credentials.xlsx

4. Support & FAQs

4.1 Support

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

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	23/10/2020	Shahid Badusha	Release Version

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