

A360 Invoicely Assistant Bot

Readme

Version 1.0
23/09/2021

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..... | 4 |
| 3. Getting Started | 5 |
| 3.1 Quick Start | 5 |
| 3.1.1 Setup | 5 |
| 3.1.2 Configuration | 5 |
| 4. Support & FAQs | 8 |
| 4.1 Support | 8 |
| 4.2 FAQs..... | 8 |
| Appendix A: Record of Changes | 9 |
| Appendix B: References | 10 |

1. Introduction

This document contains all essential information for the user to make full use of this Automation 360 Invoicely Assistant Bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the Bot.

1.1 Overview

The Invoicely Assistant Bot is designed to demonstrate how Automation Anywhere's RPA tool enables a user to automate rule based repetitive process. Here is the scenario built with this bot: A user can create multiple Individual and Organization Clients using the Config file which the bot uses to populate data into the Invoicely website.

1.2 Use cases

The key use cases include:

- Creation of multiple Individual and Organization clients on the Invoicely website.

2. Requirements & Prerequisites

2.1 System Requirements

[Automation 360 \(Cloud deployed\) 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 Automation 360 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Automation 360 setup to run in your machine.
- Bot creator license.
- Invoicely account with Credentials preferably stored in Credential vault.
- Folder structure and updated Config excel in Input folder

3. Getting Started

3.1 Quick Start

3.1.1 Setup

- Install the Bot from Bot Store into your Control Room.
- Navigate to Invoicely Assistant Bot folder within the Bot Store folder to examine the installed bots.

3.1.2 Configuration and Use

Set Invoicely Credentials preferably in the credential vault, update the mapping of these variables in Invoicely Login bot. Populate values into Config file.

Run the Invoicely Assistant Bot - Main, the required folder structure will be created. Now place the config file at 'C:\ProgramData\AutomationAnywhere\Bots\Invoicely Assistant Bot\Input\Config File.xlsx', populate the same with Invoicely URL of the required business, Set value as TRUE if Individual or Organization client needs to be added for the particular Business. Populate the required data for the same in sheets.

Process Flow:

Invoicely Assistant Bot - Main - The main bot from within which the other sub bots (Initialize, Invoicely Login, Client Creation) are called.

Initialize - The bot where Important variables are assigned, folder paths are checked, the config file data is read and run log file is created if not present.

Invoicely Login - The bot where the Invoicely website is launched on Google Chrome browser as per the business URL provided in the config file. The Credential variables are assigned from the credential vault and bot logs into the website.

Client Creation - As per the Flag set in Config file data is fetched from Individual and/or Organization sheet and is populated on the website to create the respective Clients. After the creation the bot logs out of the website and closes the Chrome window.

- Important variables used in the Initialize Bot –

| VARIABLES: | | | | |
|----------------------|-------------|------------------|--|--|
| Variable Name | Type | Mandatory | Purpose | Value |
| oStrRootDirectory | Text | Yes | Root directory where the Process related folders exist | C:\ProgramData\AutomationAnywhere\Bots\Invoicely Assistant Bot |
| oStrInputFolder | Text | Yes | Path where the Input folder is created | \$oStrRootDirectory\$\Input |
| oStrConfigFilePath | Text | Yes | Path where the Config file is to be placed | \$oStrInputFolder\$\Config File.xlsx |
| oStrLogFolder | Text | Yes | Path where the log folder is created | \$oStrRootDirectory\$\Logs |
| oStrRunLogPath | Text | Yes | Path where the run log file is created and updated | \$oStrLogFolder\$\RunLog.csv |
| oDictConfig | Dictionary | Yes | Variable where the Config data is assigned | Eg: 'Individual' - 'TRUE' |

| | | | | |
|--------------------|------|-----|---|-------------------------------|
| oStrSnapshotFolder | Text | Yes | Path where the Snapshot folder is created | SoStrRootDirectory\$\Snapshot |
|--------------------|------|-----|---|-------------------------------|

*Sample Config file is included in this bot (Control room file)

- Important variables used in the Invoicely Login Bot –

| VARIABLES: | | | | |
|----------------------|-------------|------------------|---|---------------|
| Variable Name | Type | Mandatory | Purpose | Value |
| CredUserName | Credential | Yes | User name value fetched from Credential vault | Eg: User1 |
| CredPassword | Credential | Yes | Password value fetched from Credential vault | Eg: Abcd@3456 |

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 [Automation 360](#).

4.2 FAQs

Q: Can I make changes to this process/bot?

A: Absolutely. Free process/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 Automation 360: [See the Automation 360 FAQs](#).

Appendix A: Record of Changes

| No. | Version Number | Date of Change | Author | Notes |
|----------|----------------|-------------------|-------------------|---------------------------------------|
| 1 | <i>1.0.0</i> | <i>23-09-2021</i> | <i>Nitin Alex</i> | <i>Initial version of the process</i> |

Appendix B: References

| No. | Topic | Reference Link |
|-----|---|----------------------------|
| 1 | Overview of Automation 360 | Click here |
| 2 | Guidance: Building basic Automation 360 bots | Click here |
| 3 | Guidance: Building Automation 360 action packages | Click here |
| 4 | APeople Community Forum | Click here |
| 5 | Automation Anywhere University | Click here |