

# Products Creation In Quickbook

## README

**Version 1.0**

**05/10/2021**

---

## Table of Contents

<b>1. Introduction .....</b>	<b>3</b>
1.1 Overview .....	3
1.2 Use Cases .....	3
<b>2. Requirements &amp; Prerequisites.....</b>	<b>4</b>
2.1 System Requirements .....	4
2.2 Prerequisites .....	4
<b>3. Getting Started .....</b>	<b>4</b>
3.1 Quick Start .....	4
3.1.1 Configuration & Use .....	4
<b>4. Support &amp; FAQs .....</b>	<b>7</b>
4.1 Support .....	7
4.2 FAQs .....	7
<b>Appendix A: Record of Changes .....</b>	<b>8</b>
<b>Appendix B: References.....</b>	<b>9</b>



## 1. Introduction

---

This document contains all essential information for the user to make full use of the Bot Product Creation in QuickBooks. It includes a description of the functions and capabilities and step-by-step Procedures for setup & configuration of the bot.

### 1.1 Overview

The Bot, Product Creation in QuickBooks is designed to automatically restock non-inventory products and services to fulfill sales and ensure that with automation platform, you can set up products and services to complete themselves at certain stock thresholds by eliminating manual data entry and errors that may occur.

### Steps

Steps followed in the bot build:

- Select the config file from the location
- Read required QuickBooks login URL from the config file.
- Create a QuickBooks account and store the username and password in the credential vault.
- The bot reads data from the Noninventory.xlsx file and automate the fields in the non-inventory product and services.
- The bot creates an Error Log folder in the AA Dir as follows:

C:\ProgramData\AutomationAnywhere\Bots\Create Products in Quickbooks\Error Log

### 1.2 Use cases

The key use cases include:

- 1 This bot can be used to create bulk products in QuickBooks website.
- 2 Reliable and Efficient
- 3 Time Saver
- 4 Easy to use

## 2 Requirements & Pre-requisites

---

### 2.1 System Requirements

#### [A360 \(Cloud deployed\) 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 A360 (Cloud deployed) or Community Edition user on your local machine.

### 2.2 Prerequisites

1. Automation 360 setup to run in your machine
2. Bot creator license
3. QuickBooks account with Credentials preferably stored in Credential vault.
4. Update the Noninventory.xlsx file as per our requirement.

---

## 3 Getting Started

---

### 3.1 Quick Start

#### Setup

- Install the Bot from Bot Store into your Control Room.
- Navigate to Bot Store folder to examine the installed bots after successful installation click on add to my bot.

#### 3.1.1 Configuration and Use

- Quickbook Credentials  
User need to set their username as well as password in the following variables
  - \$Quickbook\_userName\$
  - \$Quickbook\_passWord\$



- **Process Flow**

Run the Product Creation in QuickBooks Main Bot, the required folder structure will be created. As per Business requirement , users can populate the required data and update the Non-inventory.xlsx file which is available in the AA dir as follows;

C:\ProgramData\AutomationAnywhere\Bots\Create Products in Quickbooks\Output\Non-inventory.xlsx

**Product Creation in Quickbooks\_Main** - The main bot from within which the other child bots (Initialize, Login \_ Quickbooks, Creation of bulk products) are called and all the variables used in the child bots are mapped to the variables in the Main Bot.

**Initialize** - The bot where important variables are assigned for AA directory and create folder paths and check their existence .

**Login \_ Quickbooks** - The bot where the Quickbooks 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.

**Creation of bulk products** - As per the populated fields on the non-inventory.xlsx ,create the respective products. After the creation the bot closes the Chrome window.

Mainly used variables are listed below.

<b>VARIABLES: The variables which used in the Initialize bot</b>				
<b>Variable Name</b>	<b>Type</b>	<b>Mandatory</b>	<b>Purpose</b>	<b>Value</b>
sAppRoot	String	Yes	Root directory where the Process related folders exist	C:\ProgramData\AutomationAnywhere\Bots\Create Products in Quickbooks
Runlogpath	String	Yes	Path where the run log file is saved	\$LogFolder\$\Log_File.csv
Output	String	Yes	The folder needs to create for downloading the Config file from the Control room	\$sAppRoot\$\Output

**VARIABLES: The variables which used in the bot Login \_ Quickbooks :**

Variable Name	Type	Mandatory	Purpose	Value
dconfigDictionary	Dictionary	Yes	The Quickbook URL read from the Config file in the CR.	\$dconfigDictionary{URL}\$
Quickbook_username	Credential	Yes	Path where the run log file is saved	Eg: <i>test@gmail.com</i>
Quickbook_password	Credential	Yes	The folder needs to create for downloading the Config file from the Control room	Eg: <i>test@1234</i>

## 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.	1.0	05/10/2021	Jisha Rose	Initial version of the process



---

## Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A360	Click <a href="#">here</a>
2	Guidance: Building basic A360 bots	Click <a href="#">here</a>
3	Guidance: Building A360 action packages	Click <a href="#">here</a>
4	APeople Community Forum	Click <a href="#">here</a>
5	Automation Anywhere University	Click <a href="#">here</a>