



Salesforce Opportunity Update and Lead Creation for SAP Build Process Automation

Readme

Version 1.0

18/10/2023

Table of Contents

1. Introduction	3
1.1 Overview	3
1.2 Use Cases	3
2. Requirements & Prerequisites	3
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 Anywhere A360 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 purpose of the included bots is to deliver customizable templates for our customers to perform the following actions:

- The Opportunity Update template automates the steps required to change the pipeline stage of any opportunity within Salesforce to which the defined user within the automation has the ability to edit.
- The Lead Creation template automates the steps required to create a new Lead record within Salesforce, allowing you to pass in all required attributes for the new Lead.

The templates were created using standard objects and fields in Salesforce and are designed to be easily updated to meet the customizations that may be applied to your Salesforce instances. While the initial goal was to ensure that these automations can be deployed via SAP Build Process Automation, there is no hard requirement that this be the trigger and therefore the automations can be run independently as well.

1.2 Use cases

The key use cases include:

- The Opportunity Update template automates the steps required to change the pipeline stage of any opportunity within Salesforce to which the defined user within the automation has the ability to edit.
- The Lead Creation template automates the steps required to create a new Lead record within Salesforce, allowing you to pass in all required attributes for the new Lead.

Providing the following business benefits:

- Deploy and use the automations immediately
- Customizable scenarios based on business requirements
- Reduce manual effort – an employee can concentrate on the more important tasks by allowing updates in Salesforce to be triggered by events in SAP S/4HANA or other external systems
- Ensure near real time updating of Salesforce Lead and Opportunity data, ensuring your systems of record are kept in sync
- Eliminate the human error associated with swivel chair copying of data from system to system

2. Requirements & Prerequisites

2.1 System Requirements

[Enterprise 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 Enterprise A2019 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Automation Anywhere A360
- 1 or more Bot Runner licenses
- Completed deployment of Bot Runner devices
- Salesforce CRM with user permissions to Opportunity and/or Lead objects
- Salesforce Connected App to configure the Salesforce Command Package in each bot

3. Getting Started

3.1 Quick Start

3.1.1 Setup

Download and add the bots to our Control Room workspace through the Bot Store. The bots will be deployed in the following folder structure:

Bots > SAP Build Process Automation > Create New Lead

Bots > SAP Build Process Automation > Update Opportunity Stage

Configuration and Use

1. The import process may take 1-2 minutes to complete. You can refresh the folder listing to check if the artifacts have been successfully generated. You should see the following folder structure created:

- ▼ Bots

- ▼ SAP Build Process Automation

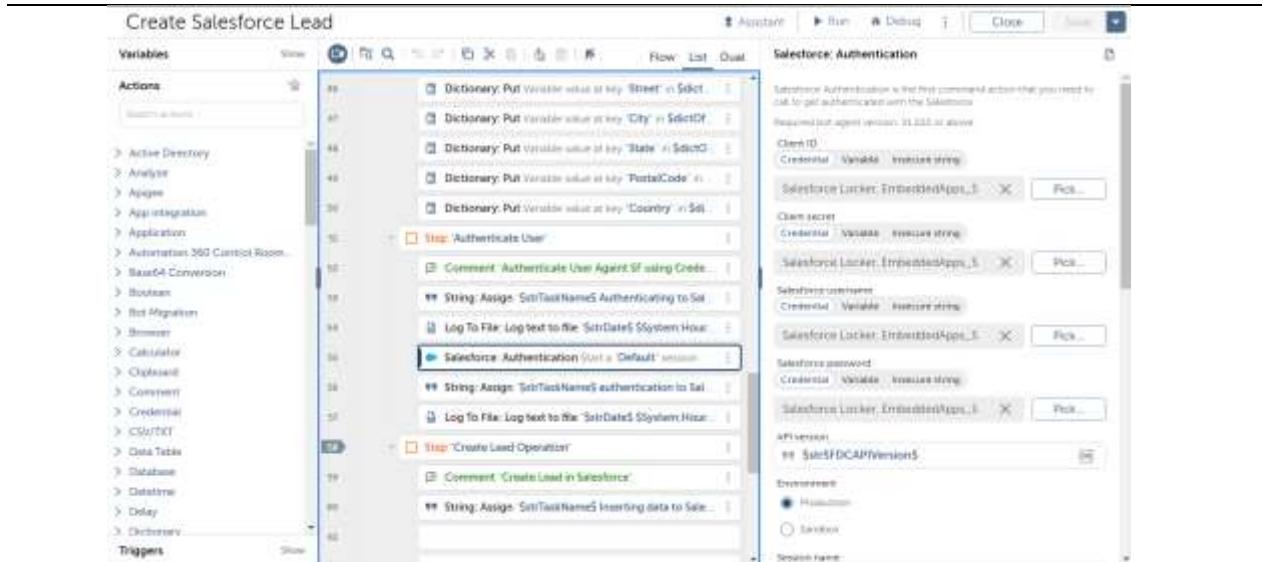
- ▼ Create New Lead

- Config

- ▼ Update Opportunity Stage

- Config

2. Once the automations have been fully imported, you'll need to make some updates. Both task automations have been designed to utilize Control Room Credential Vault to read Salesforce login attributes at runtime. See documentation [here on setting up Credential Vault lockers and credentials](#).
3. Once you've set up your credentials, you can update the Salesforce Authentication steps in both the Create Salesforce Lead automation and the Update Opportunity Stage automations



4. Both automations have been designed to read re-usable environment values from the Config.xml file located in their respective Config folders. You can open and edit these files directly from within Control Room. Make edits to the values under the appropriate section which indicates where the automations have been deployed to; Development, UAT or Production.

Attribute	Description
EmailFrom	From Address used in SMTP settings when sending emails based on exceptions
EmailTo	To target Address used in SMTP settings when sending emails based on exceptions
EmailSMTPHost	Server hostname of the SMTP server
EmailSMTPPort	SMTP port used to communicate with the SMTP server
LogFolderPath	Local folder path on the bot running device where log files will be generated during execution
LogFilePath	Log file name which will store the logging entries
TempFolderPath	Local folder path used to store temporary files used in the execution of the task
SFDC_API_Version	Salesforce API version of the instance the automation will connect to

5. Navigate to the Global Values menu item
6. Create a new Global Value called Environment

7. Assign a value to the variable of either Development, UAT or Production, depending on which of these best represents the purpose of the Control Room in your development lifecycle.



8. Update either automation with additional customizations as needed to support your use case or your customizations within your own Salesforce instance. For example, the Create Salesforce Lead automation only utilizes standard Lead fields to create the target Lead record. Add additional input variables and update the Dictionary as required to support your customizations.
9. Check your automation into the Public folder when ready



10. When you're ready to run the automations, both have been configured to accept values as input variables that can be provided through the Control Room interface or as input data variables through the API if triggering programmatically.

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 A360](#).

4.2 FAQs

For questions relating to Enterprise A2019: See the [Enterprise A360 FAQs](#).

Appendix A: Record of Changes

Instructions: Provide information on the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.

No.	Version Number	Date of Change	Author	Notes

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