
Extract From W-9 – README

Bot Scope

This bot takes data from W-9 documents in PDF and puts the data into an Excel Spreadsheet. When it is done, it emails the user with the results and the final spreadsheet.

Bot Overview

This bot performs the following:

- W-9s are available in digitized PDF format in a single folder
- The bot reads vendor information from each W-9 PDF in a folder and writes them into an Excel spreadsheet.
- Any error encountered during data translation is logged in a log file.
- At the completion of data translation, the bot emails the user with the final Excel spreadsheet and notes all errors encountered in the translation process.
- This bot also creates an “Error Folder” with “Logs” and “Snapshots” Subfolders as shown below in the AA Directory hierarchy.
- The path for Bot Store: -
`$AAAApplicationPath$\Automation Anywhere\My Tasks\Bot Store\ExtractFromW9-Peopleshores`

Pre – Requisites

- Automation Anywhere Enterprise v11.3
- Microsoft Excel
- Digitized W-9s of the customers, saved as PDFs in a single folder
- A customized configuration file with the following Attributes
 - o User notification sender email
 - o User notification receiver email
 - o name of final spreadsheet
 - o Folder path of vendor W-9s

Installation

- Download the bot from the Bot Store
- Unzip the zip archive
- For first time users, create "Bot Store" folder under<AA Directory>\My Tasks (on your local disk)
- Copy folder "**ExtractFromW9-PeopleShores**" to above created Bot Store folder inside<AA Directory>\My Tasks in Automation Anywhere folder on your local disk

Create the following folder structure for the content in the AA Directory:

- <AA Directory>
 - My Tasks
 - Bot Store
 - ExtractFromW9–Peopleshores (Folder)
 - Error Folder (Folder)
 - Logs (Folder)
 - Snapshots (Folder)
 - Input Files (Folder)
 - BlankSpreadsheet.xlsx
 - W9 1.pdf
 - W9 2.pdf
 - [...]
 - Extract From W9 Input File.txt
 - Output Files (Folder)
 - Current Spreadsheet.xlsx(optional)
 - My Tasks (Folder)
 - Extract from W9.atmx

How to use the bot:

Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
Configuration File			
Sender Email	String	Input	This is the person who will send the email notifying of task completion and containing the results.
Receiver Email	String	Input	This is the person who will receive the email notifying them of task completion and containing the results.
W-9 Folder Path	String	Input	This is the folder path of the folder of W-9s. If this folder does not exist, the bot will abort and an error email will be sent.

Final Spreadsheet Path	String	Input	This is where the spreadsheet of information translated from the vendor is saved. It can either be where a new spreadsheet is wanted or into a spreadsheet which already exists
Bot Variables Note: All are internal and should not be needed by the user			
vTask	String	Input	This is the file path to the folder where the files are located. To change it, you must go into the code and change line 2.
vErrorFolder	String	Input	This is the file path to the Error Folder. By default, it is inside the Task Folder. If you wish to change it, you must go into the code and change line 3.
vSnapshotFolder	String	Input	This is the file path to the Error Snapshot Folder. By default, it is inside the Error Folder. If you wish to change it, you must go into the code and change line 5.
vLogFolder	String	Input	This is the file path to the Error Log Folder. By default, it is inside the Error Folder. If you wish to change it, you must go into the code and change line 4.
vReceiverEmail	String	Input	This is where the Receiver Email from the Configuration file is put.
vSenderEmail	String	Input	This is where the Sender Email from the Configuration file is put.
vExcel	String	Input	This is the file path to the final spreadsheet of data.
vW9	String	Input	This is the file path to the folder of W9s.
vBlankSpreadsheet	String	Input	This is the file path to the blank spreadsheet that must be copied if vExcel does not exist.
vLog	String	Input	This is the file path to the folder of resumes already uploaded. By default, it is inside the Task folder. If you wish to change it, you must go into the code and change line 19.

vCurrentRow	String		This variable is used to find the first empty row in the spreadsheet and track the current row. User does not need to worry about it.
Spreadsheet Variables Note: All are internal and should not be needed by the user			
vCompany	String	Output	The company name of the client to be added to customers. It is added to the first Excel Column.
vDisplayName	String	Output	The display name of the client. It is the same as the company name.
vStreetAddress	String	Output	This is the street address of the client.
vCity	String	Output	This is the City of the client.
vState	String	Output	This is the State or Province the client is in.
vZip	String	Output	This is the zip or postal code the client is in.
vCountry	String	Output	This is the country the client is in. Because we are using W9s, it is always "United States of America".

Error Handling

- Each Bot folder contains the below hierarchy.
 - Error Folder
 - Logs
 - Error Logs Month-Day-Year.txt: In case of any error, this file captures the error message
 - Snapshots
 - Error Snap Month-Day-Year Hour-Minute.png: In case of any error, this file captures the screenshot of the error.
- Status of Bot is set to failed.

More Information

- User may need to edit variable vTask to reflect the location/path where the bot folder is located.
- If you have any questions or feedback, please reach out to us at support@peopleshores.net.

Bot Deployment

