FreeAgentCustomerListCreation – Readme

Bot Overview

This bot performs the following:

- Reads the customer records in the csv and adds the customer records to the web application FreeAgent.

This bot helps in automating the Customer List Creation in a web application called FreeAgent.
1. Once you run the bot, it requests for user login and password. This is obtained from the user for easy understanding of the bot.It is efficient if those data are hardcoded. Changes can be made to the code by the user.
2. Once the login credentials are entered, then the bot logs you into the FreeAgent website.
3. Once logged in, a prompt window appears asking for the excel file containing all the customer list.
4. Select the file and click "OK". You can sit back and watch the Customer Details being automatically created in your FreeAgent web application.

Prerequisites

- Automation Anywhere Enterprise v11.x

Installation

- Download the bot from Bot Store.
- Double click on the .msi file.
- On Welcome to Installation wizard, click Next to continue.
- Click I agree to the terms in the license agreement radio button to accept the agreement.
- Get/Copy the License key from Bot Store Downloads into License Key, click Next to continue.
- Click Install to begin the installation.
- Click Finish to complete the installation.
- To view the installation, go to 'My Tasks' folder on AAE Client to see bot files.

Uninstall

- Open Add/Remove Programs -> Select the Bot/Digital Worker to be installed
- Click uninstall

Creates the following folder structure of the content in the AA Dir:

<AA Directory>
  o My Tasks
    ▪ Bot Store

- Read Content-AA (Folder)
  - My Tasks
    - [Read from File] Create Customer List.atmx
  - Error Folder
    - Logs (Folder)
      - Error Logs Month-Day-Year.txt
    - Snapshots (Folder)
      - Error Snap Month-Day-Year.png

How to Use the Bot:

Use the following information to configure your bot:

Parameter Name	Type	Direction	Additional Info
vErrorFolder	String	Input	This is error folder inside bot folder which contains Logs and Snapshots folder
vLogFolder	String	Input	This folder contains Log file in case of error C:\Users\Vishvesh\Documents\FreeAgentCustomerListCreation-Desicrew\Error Folder\Logs Update the PC_Name to your corresponding PC Name
vSnapshotFolder	String	Input	This folder contains Screenshot in case of error C:\Users\PC_Name\Documents\FreeAgentCustomerListCreation-Desicrew\Error Folder\Snapshots Update the PC_Name to your corresponding PC Name
vLogin	String	Input	Prompts Login ID from the user. Make changes and hardcode it for better efficiency
vPassword	String	Input	Prompts password from the user.Make changes and hardcode it for better efficiency.

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 logs error message along with time stamp
    - Snapshots
      - Error Snap Month-Day-Year.png: In case of any error, this file captures screenshot of error.
- Task Status of bot is set to failed in case of errors.