



desicrew

FreeAgent Invoice Creation

Readme

Version 1.0

14/01/2019

Table of Contents

1. Introduction	3
1.1 Overview	3
1.2 Common Use cases.....	3
2. Requirements & Prerequisites.....	4
2.1 System Requirements.....	4
2.2 Prerequisites	4
2.4 Disclaimers	4
3. Getting Started	5
3.1 Skill Matrix	5
3.2 Installation Hierarchy	5
3.3 Uninstall	Error! Bookmark not defined.
3.4 Variables in this bot	5
4. Logs.....	7
5. Troubleshooting & Support	8
5.1 Support	8

1. Introduction

This document contains all the necessary information for the functioning of the FreeAgent Invoice Creation Bot.

1.1 Overview

This bot will help you create Invoices in FreeAgent.

Initially the bot automatically logs you into FreeAgent. Then it prompts the user for the Excel file with all the Invoice details. Once the user provides with the necessary Excel sheet. It prompts the user "If this is their first invoice creation or not?". Depending on the answer the bot acts accordingly. The bot opens the excel spreadsheet, reads the Invoice data row by row and creates Invoices one by one.

1.2 Common Use cases

This bot is mainly used for Invoice Processing. It is quite useful for a companies that use Free Agent for Accounting. With this bot the employee doesn't have to spend more time in creating Invoices. Accuracy is also ensured with this bot.

2. Requirements & Prerequisites

2.1 System Requirements

Instructions: Provide Minimum Hardware Configuration requirement needed for successful execution.

2.2 Prerequisites

Automation Anywhere Enterprise Edition v11 and above or Automation Anywhere Community Edition

2.3 Disclaimers

Before using this bot, make sure you have Customers added to your FreeAgent account. You can use the FreeAgentCustomerListCreation bot by Desicrew Solutions Pvt. Ltd from Bot Store to add Customers.

You must also make sure that the Excel file you have strictly adheres to the correct format. Example file is provided under the input folder.

3. Getting Started

3.1 Skill Matrix

This bot has only one Task Bot. It is not dependent on any other bots.

3.2 Installation Hierarchy

- *Download the bot from the 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 terms.*
- *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 the bot.*
- *Click on 'FreeAgent Invoice Creation' to run the bot.*

3.3 Uninstall

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

3.4 Variables used in the Bot

- *For this Bot –*

INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandatory	Purpose	Example Input
<i>vFilePath (obtained from user prompt)</i>	<i>Text</i>	<i>Yes</i>	<i>File Name for the Excel file from which Bot reads the value from. Format – Filename. Extension</i>	<i>C:/File_Path.Extension</i>
<i>vLoginID</i>	<i>Text/Number</i>	<i>Yes</i>	<i>Login Email ID for your FreeAgent Account</i>	<i>xyzcompany@gmail.com</i>
<i>vPassword</i>	<i>Text/Number</i>	<i>Yes</i>	<i>Password for your FreeAgent Account</i>	<i>***** (or alter the password in the object cloning command)</i>

<i>vErrorFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This is the error folder which contains the Logs folder and the Snapshot Folder</i>	
<i>vLogFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This folder contains the logs in case of error</i>	<i>C:\your file path\</i> <i>FreeAgentInvoiceCreation-</i> <i>Desicrew\Error</i> <i>Folder\Logs</i> <i>Update the file_path to</i> <i>your corresponding path</i>
<i>vSnapshotFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This folder contains the snapshots of error in case of error</i>	<i>C:\your file path\</i> <i>FreeAgentInvoiceCreation-</i> <i>Desicrew\Error</i> <i>Folder\Snapshots</i> <i>Update the file_path to</i> <i>your corresponding path</i>

4. Logs

Each Bot error logs in the following structure :

. o 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.

5. Troubleshooting & Support

5.1 Support

You can contact info@accountifi.co for any support regarding the bot.