



Salesforce Lead Creation

Readme

Version 1.0

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1. Introduction

This document contains all essential information for the user to make full use of the Bot or Digital worker. This manual includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

This bot performs the following:

- *Login to <https://login.salesforce.com>*
- *Read leads data in excel*
- *Create leads in Salesforce*

1.2 Common Use cases

Create leads in Salesforce from excel

1.3 Prerequisites

MS Excel, Google Chrome

2. Getting Started

2.1 Installation Hierarchy

<AA Directory>

- *My Tasks*
 - *Bot Store*
 - *SalesforceLeadCreation-LaputaTechnologiesLimited (Folder)*
 - *My Tasks*
 - *Input Folder*
 - *Leads.xlsx*
 - *Output Folder*
 - *Error Folder*
 - *Error Log.txt*
 - *My Metabots*

2.2 Quick Start

2.2.1 Setup

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

2.2.2 Configuration

1. *Create Credentials "SFDC - Login" in Control Room with Attribute "Login Name" and "Password".*
2. *Create Locker "Credential Locker" in Control Room.*
3. *Make sure the user running the bot have privilege to access credentials "SFDC - Login"*