

## SAP CRM OPPORTUNITY UPDATE PROCESS

#### **Bot Overview**

SAP CRM Opportunity update is a day to day activity and the process involves updating of CRM Opportunity and maintain the SSR Tracker excel input sheet, So that anyone can track the CRM opportunity status at any point of time.

## This bot performs the following:

- Open the SSR Tracker excel input file.
- Check if SSR Stage is "Won" or not. If it is not 'Won' And Invoice No, CRM Id, SO No. Is not blank
- Login into SAP CRM
- Open CRM Opportunity
- Update the Opportunity
- Save the current opportunity
- And update the SSR stage as 'Won' in SSR tracker excel input sheet.

### **Prerequisites**

- Automation Anywhere Community Edition v11.3.3.0

#### Installation

- Download the bot from Bot Store.
- Double click on <Bot Name>.msi and follow the installation instructions. For first time users, the "Bot Store" folder is created under <AA Directory>/My Tasks (on your local disk).
- Installer creates the following folder structure with content under the <AA Directory>

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

### <AA Directory>

- My Tasks
  - Bot Store
    - Parent Folder-AA (Process Name)
      - My Tasks (Folder)
        - [Process Name]. atmx
      - My MetaBots (Folder)
        - SAP CRM Opportunity Update.mbot
      - Log Folder
        - Log-dd-mm-yyyy.txt
        - Log-dd-mm-yyyy.xls
      - o Input Folder
        - SSR Tracker
        - Config File (Contain list of all the input file with their path)
      - Error Folder (Folder)
        - Logs (Folder)
          - Error Logs Month-Day-Year-Hr-Min-Sec.txt
        - Snapshots (Folder)
          - Error Snap Month-Day-Year-Hr-Min-Sec.png

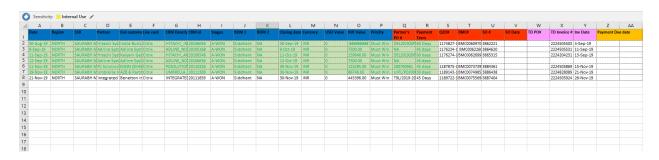


## How to Use the Bot:

# Use the following information to configure your bot:

Parameter Name	Туре	Direction	Additional Info
vErrorFolder	String	Input	This is error folder inside bot folder which contains Logs and Snapshots folder (Already defined, no need to add value unless want to change location of file).
vLogFolder	String	Input	This folder contains Log file in case of error (Already defined, no need to add value unless want to change location of file).
vSnapshotFolder	String	Input	This folder contains Screenshot in case of error (Already defined, no need to add value unless want to change location of file).

- The SSR Tracker input file having mandatory columns as Stages, CRM Id, SO No, Invoice No.



- The config file will save the name and path of the of the required files in Column A and B respectively.

C	Sensitivity: Internal Use 📝			
1	A	В	С	D
1	File Name	Path		
		C:\Users\APRAKASH\OneDrive - TechData\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\CRM Opportunity Update - TechData Advanced Solutions\Input		
2	SSR Tracker	Folder\SSR Tracker.xlsx		
3	Mail From	ABC@gmail.com		
4	ErrorAlertMail	PQR@techdata.com		
5	SAP CRM Path	http://ENTER CRM PATH		
6				
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11				

# **Error Handling**

- Each Bot folder contains the below hierarchy.
  - o Error Folder
    - Logs
      - Error Logs Month-Day-Year-Hr-Min-Sec.txt: In case of any error, this file logs error message along with time stamp
    - Snapshots
      - Error Snap Month-Day-Year-Hr-Min-Sec.png: In case of any error, this file captures screenshot of error.
- Task Status of bot is set to failed in case of errors.