

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
 - 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	Type	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.

Sensitivity: Internal Use																													
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA		
	Date	Region	SSK	Partner	End customer Line card	CRM Desing CRM Id	Stages	BDM 1	BDM 2	Closing date	Currency	USD Value	INR Value	Priority	Partner's PO #	Payment Term	Q2OH	INCR	SO #	SO Date	TD PO#	TD Invoice #	Inv Date	Payment Due date					
1	30-Aug-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	30-Sep-19	INR	0	#####	Must Win	1174827-1	BMC0060970 3662221							2224505503	4-Sep-19					
2	9-Sep-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	30-Sep-19	INR	0	7500.00	Must Win	NA	45 days							1176224-1	BMC0060670 3864620	2224505531	11-Sep-19			
3	11-Sep-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	11-Oct-19	INR	0	129646.00	Must Win	NA	60 days							1176274-1	BMC0062699 3865315	2224204231	13-Sep-19			
4	12-Sep-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	12-Oct-19	INR	0	7500.00	Must Win	NA	45 days													
5	11-Nov-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	30-Nov-19	INR	0	123295.00	Must Win	2007709661	45 days							1187875-1	BMC0077378 3884361	2224505869	15-Nov-19			
6	18-Nov-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	30-Nov-19	INR	0	867248.00	Must Win	1187875-1	45 days							1189143-1	BMC0074985 3886438	2224826089	21-Nov-19			
7	21-Nov-19	NORTH	SAURABH Mittal	Sys India Bull's Citrix	HITACHI	IN20106056	A-WON	Siddhant	NA	30-Nov-19	INR	0	445396.00	Must Win	1187875-1	45 days							1189772-1	BMC0075569 3887404	2224569324	26-Nov-19			
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- The config file will save the name and path of the of the required files in Column A and B respectively.

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

Error Handling

- Each Bot folder contains the below hierarchy.
 - 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.