



Extracting Data from PDF Invoices - FreeAgent

Readme

Version 1.0

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1. Introduction

This document contains all the necessary information for the functioning of the Extracting Data from PDF Invoices – FreeAgent Bot .

1.1 Overview

This bot takes the folder containing all the Invoices in Native PDF Format and extracts the necessary data and puts them in an Excel sheet.

This bot is configured to work for Invoices generated from FreeAgent.

1.2 Common Use cases

This bot helps you in keeping track of the Invoices sent or issued.

Saves man hours as the extraction and saving them in excel sheet is done automatically so manual extraction is not required

2. Requirements & Prerequisites

2.1 System Requirements

Windows 10 and above.

2.2 Prerequisites

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

An empty Invoice Data file (in Excel format) must be created with the format adhering to the one specified under the Input Folder.

2.3 Disclaimers

This bot will work only on Native PDFs generated with FreeAgent web application.

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 'PDF to Excel.atmx' to run the bot.*

3.3 Uninstall

- *Open Add/Remove Programs -> Select the 'Extracting Data from PDF Invoices - FreeAgent' bot to be uninstalled*
- *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>vSourceFolder</i>	<i>Text</i>	<i>Yes</i>	<i>The Folder containing all the Invoices (PDFs)</i>	<i>C:\Folder_path</i>
<i>vDestinationFile</i>	<i>Text</i>	<i>Yes</i>	<i>The Excel File where you want to extract the data from the Invoices.</i>	<i>C:\Folder_path\File_Name.xlsx</i>
<i>vErrorFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This is the error folder</i>	<i>C:\your file path\ Extracting Data from PDF Invoices -</i>

			<i>which contains the Logs folder and the Snapshot Folder</i>	<i>Accountifi\Error 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\ Extracting Data from PDF Invoices -Accountifi\Error Folder\Logs Update the file_path to 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\ Extracting Data from PDF Invoices -Accountifi\Error Folder\Snapshots Update the file_path to 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.