



Salesforce API Account- Ducont Systems

Readme

Version 1.0

11/24/2020

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1. Introduction

This document contains all the information for the user to make full use of the Bot. 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 Create, Read, Update, Delete activities on account Object In salesforce.

- ✓ Create account
- ✓ Update account
- ✓ Read account
- ✓ Delete account

1.2 Detailed Steps are as follows:

Bot reads object name and activity name from config file, then bot login to salesforce and perform the operation based on the activity chosen. Apart from read activity, user has to manually feed the required account information in an input excel file. This excel file will be opened during the execution. User can fill, save and close this excel and chose to continue the bot execution.

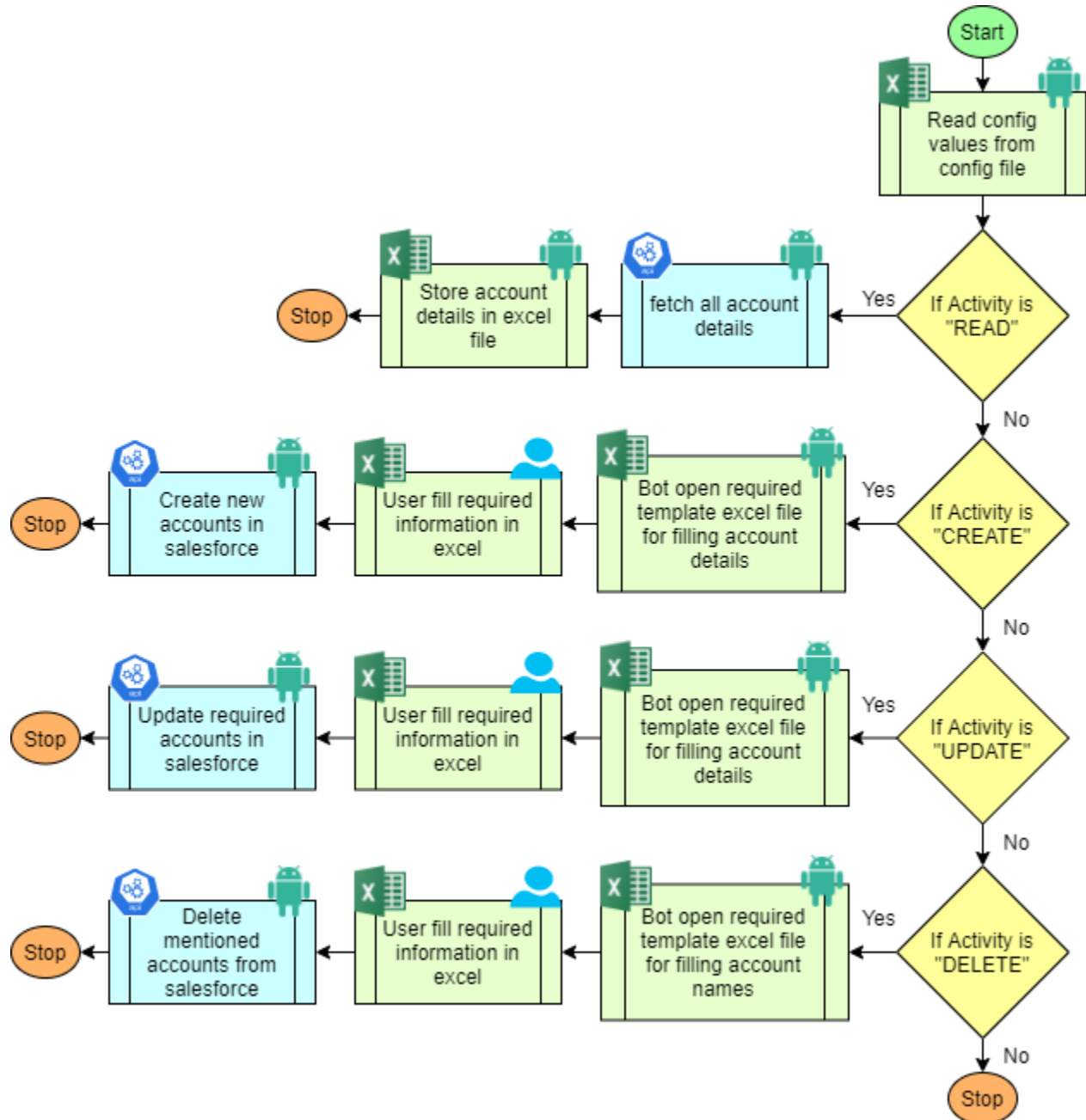
SalesForce_Ducont Metabot uses API level integration to perform following tasks: -

- Connect to Salesforce, for authentication it uses **Username, Password and Secure Token**, hence using the username password authentication.
- Create Account, this logic is used to Create Account in Salesforce, use this logic to insert one Account at a time.
- Update Account, this logic is used to update Account in Salesforce. Use this logic to updates one Account at a time.
- Delete Account, this logic is used to delete Account from Salesforce.

This condition requires little input from the User

- **Object:** Specify which object name in salesforce.
- **Activity:** Specify which activity bot should perform.

1.2.1 Flow Diagram:



2. Input and Output Examples:

Go to the Input Folder in the Downloaded Task inside Bot Store folder & Open the “Config.xlsx” File.

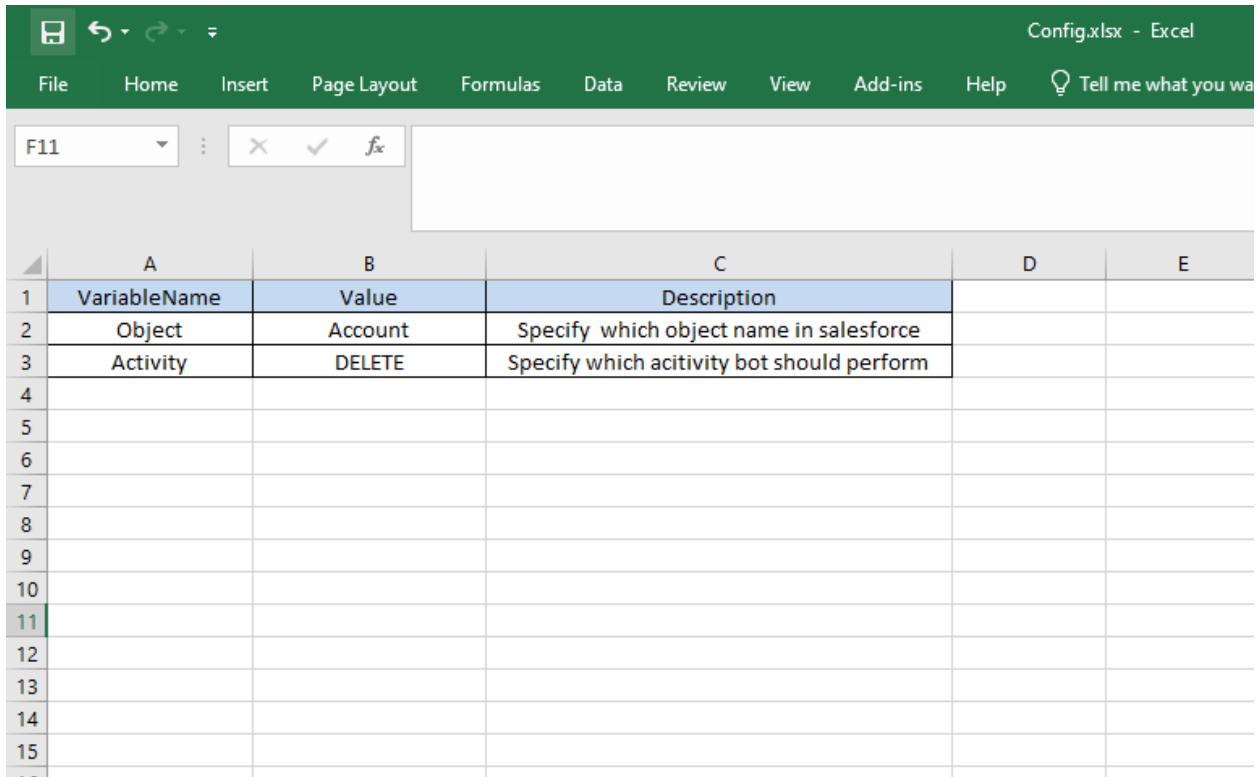
2.1 Scenario 1 –

Create accounts in salesforce.

In the Config.xlsx

- ✓ Enter the *Object* in cell ‘B2’, Sheet: **Config**
- ✓ Enter the *Activity* in the Cell ‘B3’, Sheet: **Config**

Config:



	A	B	C	D	E
1	VariableName	Value	Description		
2	Object	Account	Specify which object name in salesforce		
3	Activity	DELETE	Specify which activity bot should perform		
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Sample Input:

InsertAccount_23112020_205310.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Add-ins Help Tell me what you want to do

E19

	A	B	C	D	E	F	G	H	I
	Account Number	Account Name	Account Site	Annual Revenue	BillingAddress_street	BillingAddress_city	BillingAddress_state	BillingAddress_postalCode	BillingAddress_o
1	CD656092	AABot1							
2	CD656092	AABot2		149000000	2 Place Jussieu	Austin	TX		
3	CD656092	AABot3		350000000	525 S. Lexington Ave	Burlington	NC	27215	USA
4	CC213425	AABot4		950000000	2 Place Jussieu	Paris		75251	France
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Sample Output:

Accounts

All Accounts

16 Items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

Search this list...

	Account Name	Account Site	Billing State/Provi...	Phone	Type	Account Own...
1	AABot1					BP V
2	AABot2		TX			BP V
3	AABot3		NC			BP V
4	AABot4					BP V
5	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	BP V
6	Dickenson plc		KS	(785) 241-6200	Customer - Channel	BP V
7	Edge Communications		TX	(512) 757-6000	Customer - Direct	BP V
8	Enxess Industrie and Transport		OR	(503) 471-7800	Customer - Channel	BP V

Logfile:

```

Salesforce API Account- Ducont Systems_26112020_16115 - Notepad
File Edit Format View Help
(26/11/2020 16:11:05) =====
(26/11/2020 16:11:05) Bot Started
(26/11/2020 16:11:08) Connected to Config File
(26/11/2020 16:11:08) Extracted config values....
(26/11/2020 16:11:08) Object Name: [Account]
(26/11/2020 16:11:08) Activity Name: [CREATE]
(26/11/2020 16:11:09) Disconnected from config file
(26/11/2020 16:11:31) Successfully logged in salesforce
(26/11/2020 16:11:45) Connected to Insert account file
(26/11/2020 16:11:46) account [AABot1] has been created with id : [0015g0000036zgWAAQ]
(26/11/2020 16:11:47) account [AABot2] has been created with id : [0015g0000036zgbAAA]
(26/11/2020 16:11:47) account [AABot3] has been created with id : [0015g0000036zggAAA]
(26/11/2020 16:11:48) account [AABot4] has been created with id : [0015g0000036zglAAA]
(26/11/2020 16:11:48) End
(26/11/2020 16:11:48) =====
  
```

2.2 Scenario 2 –

Read accounts from salesforce

In the Config.xlsx

- ✓ Enter the *Object* in cell 'B2', Sheet: **Config**
- ✓ Enter the *Activity* in the Cell 'B3', Sheet: **Config**

Config:

File Home Insert Page Layout Formulas Data Review View Add-ins Help			
C6			
	A	B	C
1	VariableName	Value	Description
2	Object	Account	Specify which object name in salesforce
3	Activity	READ	Specify which activity bot should perform
4			
5			
6			
7			

Output Folder Path:

Output excel files are generated in output folder path.

Path: %\$AAApplicationPath%\Automation Anywhere\My Tasks\Bot Store\ Salesforce API Account- Ducont Systems\Output Folder

Output Folder

ne Share View

↑ << Binoj > AA > Automation Anywhere Files > Automation Anywhere > My Tasks > Bot Store > Salesforce API Account- Ducont Systems > Output Folder

Name	Date modified	Type	Size
ReadAccount_25112020_174930	25/11/2020 17:50	Microsoft Excel W...	13 KB
ReadAccount_26112020_161652	26/11/2020 16:17	Microsoft Excel W...	14 KB

Process
P
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:om
e - ducon

Sample Output:

ReadAccount_26112020_161632 - Excel										
File Home Insert Page Layout Formulas Data Review View Add-ins Help Team Tell me what you want to do										
C5 sForce										
	A	B	C	D	E	F	G	H	I	J
	ID	Account Number	Account Name	Account Owner	Account Site	Annual Revenue	BillingAddress.street	BillingAddress.city	BillingAddress.state	BillingAddress.country
1	0015g0000036zgAAA	CD656092	AABot3	0055g000000QgxMAAS			525 S. Lexington Ave	Burlington	NC	
2	0015g0000036zgbAAA	CD656092	AABot2	0055g000000QgxMAAS			2 Place Jussieu	Austin	TX	
3	0015g0000036zglAAA	CC213425	AABot4	0055g000000QgxMAAS			2 Place Jussieu	Paris		
4	0015g000002MuT4AAK		sForce	0055g000000QgxMAAS			The Landmark @ One Market	San Francisco	CA	
5	0015g000002MuStAAK	CD451796	Edge Communications	0055g000000QgxMAAS		139000000	312 Constitution Place Austin, TX 78767 USA	Austin	TX	
6	0015g000002MuSuAAK	CD656092	Burlington Textiles Corp of America	0055g000000QgxMAAS		350000000	525 S. Lexington Ave	Burlington	NC	
7	0015g000002MuSvAAK	CC213425	Pyramid Construction Inc.	0055g000000QgxMAAS		950000000	2 Place Jussieu	Paris		
8	0015g000002MuSwAAK	CC634267	Dickenson plc	0055g000000QgxMAAS		500000000	1301 Hoch Drive	Lawrence	KS	
9	0015g000002MuSxAAK	CD439877	Grand Hotels & Resorts Ltd	0055g000000QgxMAAS		500000000	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	Chicago	IL	
10	0015g000002MuSyAAK	CD355118	United Oil & Gas Corp.	0055g000000QgxMAAS		5600000000	1301 Avenue of the Americas New York, NY 10019 USA	New York	NY	
11	0015g000002MuSzAAK	CC947211	Express Logistics and Transport	0055g000000QgxMAAS		950000000	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	Portland	OR	
12	0015g000002MuT0AAK	CD736025	University of Arizona	0055g000000QgxMAAS			888 N Euclid Hallis Center, Room 501 Tucson, AZ 85721 United States	Tucson	AZ	
13							Kings Park 17th Avenue			

Logfile:


 Salesforce API Account- Ducont Systems_26112020_161631 - Notepad

File Edit Format View Help

```

(26/11/2020 16:16:31) =====
(26/11/2020 16:16:31) Bot Started
(26/11/2020 16:16:31) Connected to Config File
(26/11/2020 16:16:31) Extracted config values....
(26/11/2020 16:16:31) Object Name: [Account]
(26/11/2020 16:16:31) Activity Name: [READ]
(26/11/2020 16:16:31) Disconnected from config file
(26/11/2020 16:16:52) Successfully logged in salesforce
(26/11/2020 16:16:52) Successfully logged in salesforce
(26/11/2020 16:17:15) successfully extracted account details, output file path : [D:\Binoj\AA\Automation Anywhere Files\Automation A
(26/11/2020 16:17:15) End
(26/11/2020 16:17:15) =====
  
```

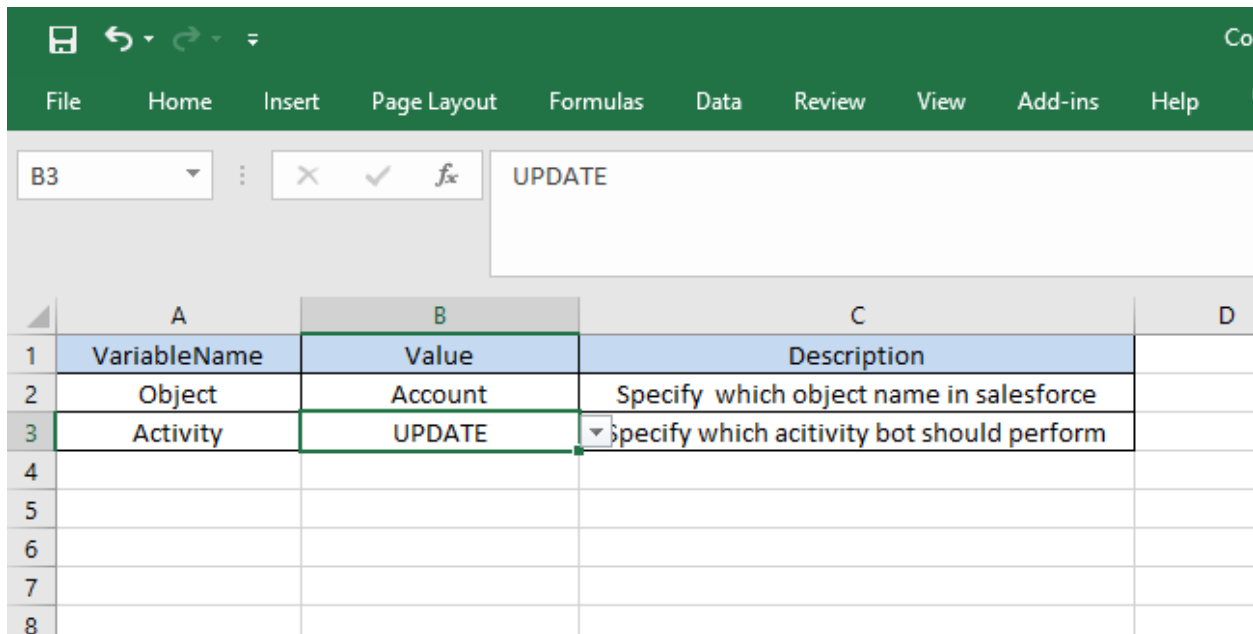
2.3 Scenario 3 –

Update accounts in salesforce.

In the Config.xlsx

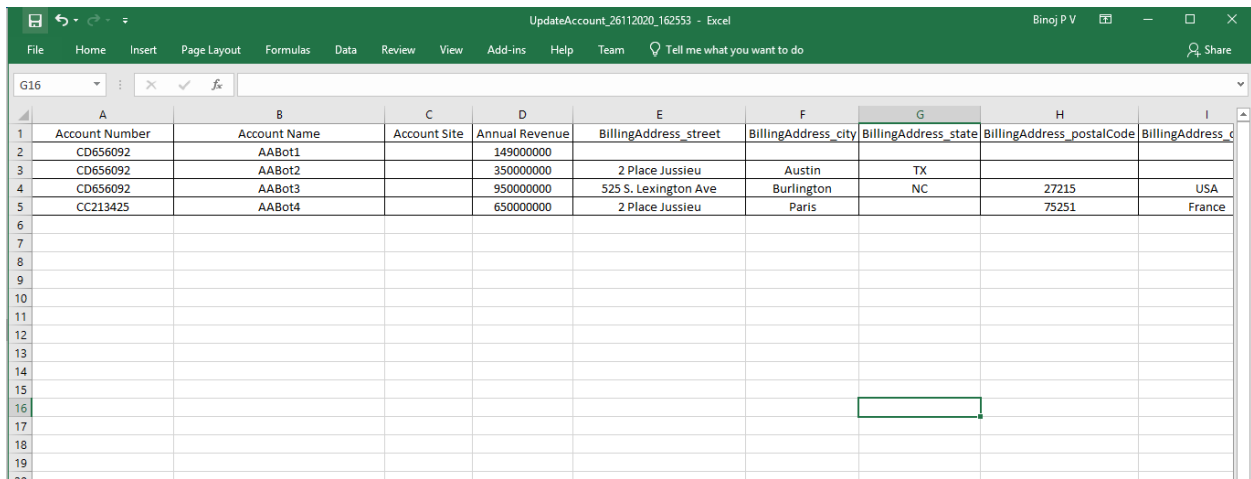
- ✓ Enter the *Object* in cell 'B2', Sheet: **Config**
- ✓ Enter the *Activity* in the Cell 'B3', Sheet: **Config**

Config:



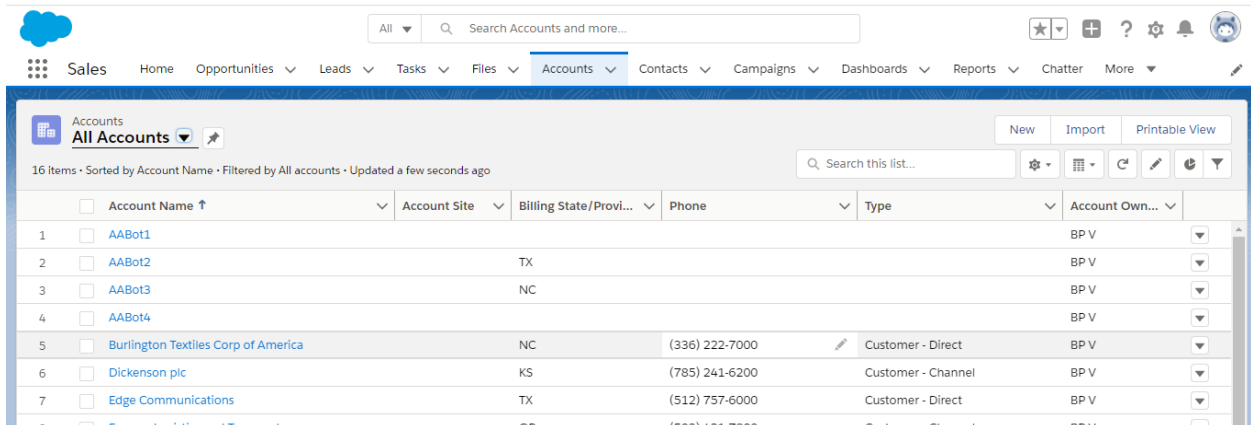
	A	B	C	D
1	VariableName	Value	Description	
2	Object	Account	Specify which object name in salesforce	
3	Activity	UPDATE	specify which activity bot should perform	
4				
5				
6				
7				
8				

Sample Input:



	A	B	C	D	E	F	G	H	I
	Account Number	Account Name	Account Site	Annual Revenue	BillingAddress_street	BillingAddress_city	BillingAddress_state	BillingAddress_postalCode	BillingAddress_country
1	CD656092	AABot1		149000000					
2	CD656092	AABot2		350000000	2 Place Jussieu	Austin	TX		
3	CD656092	AABot3		950000000	525 S. Lexington Ave	Burlington	NC	27215	USA
4	CC213425	AABot4		650000000	2 Place Jussieu	Paris		75251	France
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									

Sample Output:



	Account Name	Account Site	Billing State/Prov...	Phone	Type	Account Own...
1	AABot1					BP V
2	AABot2		TX			BP V
3	AABot3		NC			BP V
4	AABot4					BP V
5	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	BP V
6	Dickenson plc		KS	(785) 241-6200	Customer - Channel	BP V
7	Edge Communications		TX	(512) 757-6000	Customer - Direct	BP V
8	Express Logistics and Transport		ND	(505) 471-7800	Customer - Channel	BP V

Logfile:

```

Salesforce API Account- Ducont Systems_26112020_162531 - Notepad
File Edit Format View Help
(26/11/2020 16:25:32) =====
(26/11/2020 16:25:32) Bot Started
(26/11/2020 16:25:32) Connected to Config File
(26/11/2020 16:25:32) Extracted config values....
(26/11/2020 16:25:32) Object Name: [Account]
(26/11/2020 16:25:32) Activity Name: [UPDATE]
(26/11/2020 16:25:32) Disconnected from config file
(26/11/2020 16:25:53) Successfully logged in salesforce
(26/11/2020 16:26:16) Connected to Update account file
(26/11/2020 16:26:17) account [AABot1] has been updated with id : [0015g0000036zgWAAQ]
(26/11/2020 16:26:18) account [AABot2] has been updated with id : [0015g0000036zgbAAA]
(26/11/2020 16:26:19) account [AABot3] has been updated with id : [0015g0000036zggAAA]
(26/11/2020 16:26:20) account [AABot4] has been updated with id : [0015g0000036zglAAA]
(26/11/2020 16:26:20) End
(26/11/2020 16:26:20) =====
  
```

2.4 Scenario 4 –

Delete accounts from salesforce.

In the Config.xlsx

- ✓ Enter the *Object* in cell 'B2', Sheet: **Config**
- ✓ Enter the *Activity* in the Cell 'B3', Sheet: **Config**

Config:

Config.xlsx				
File Home Insert Page Layout Formulas Data Review View Add-ins Help Tell me				
B3		DELETE		
	A	B	C	D
1	VariableName	Value	Description	
2	Object	Account	Specify which object name in salesforce	
3	Activity	DELETE	Specify which activity bot should perform	
4				
5				
6				
7				
8				
9				
10				
11				

Sample Input:

DeleteAccount_26112020_163030 - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Account Name												
2	AABot1												
3	AABot2												
4	AABot3												
5	AABot4												
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													

Sample Output:

Accounts

All Accounts

12 items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

	Account Name	Account Site	Billing State/Provin...	Phone	Type	Account Own...
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	BP V
2	Dickenson pic		KS	(785) 241-6200	Customer - Channel	BP V
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	BP V
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	BP V
5	GenePoint		CA	(650) 867-3450	Customer - Channel	BP V
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	BP V
7	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	BP V
8	sForce		CA	(415) 901-7000		BP V
9	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	BP V
10	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	BP V
11	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	BP V
12	University of Arizona		AZ	(520) 773-9050	Customer - Direct	BP V

Logfile:

 Salesforce API Account- Ducont Systems_26112020_16308 - Notepad

File Edit Format View Help

```
(26/11/2020 16:30:08) =====
(26/11/2020 16:30:08) Bot Started
(26/11/2020 16:30:08) Connected to Config File
(26/11/2020 16:30:08) Extracted config values....
(26/11/2020 16:30:08) Object Name: [Account]
(26/11/2020 16:30:08) Activity Name: [DELETE]
(26/11/2020 16:30:08) Disconnected from config file
(26/11/2020 16:30:29) Successfully logged in salesforce
(26/11/2020 16:30:43) Connected to Delete account file
(26/11/2020 16:30:45) following accounts deleted successfully..
(26/11/2020 16:30:45) 'AABot1', 'AABot2', 'AABot3', 'AABot4'
(26/11/2020 16:30:45) Transaction ID : [0015g0000036zgbAAA]
(26/11/2020 16:30:45) End
(26/11/2020 16:30:45) =====
```

2.5 Common Use cases

- ✓ The bot allows reading, creating, updating and deleting accounts in Salesforce.
- ✓ Organizations can use the Metabot to automate all Salesforce account related workflow process using it.

3. Requirements & Prerequisites

3.1 System Requirements

For [PC](#) /Laptop /Server, where the Bot needs to run:

- ✓ [RAM](#) – 8 [GB](#) or Higher
- ✓ Processor - Intel Core i5 or Higher and Equivalent for any other [OS](#)
- ✓ Hard Disk – Up to 2 [GB](#) of overall free space in the [AA](#) client installation drive.

3.2 Prerequisites

- ✓ Required Salesforce login username and password with security token.
- ✓ Bot Runner machine must be able to connect to Salesforce. Verify network connectivity.
- **Software Required:**
 - ✓ [AA](#) Enterprise Client 11.x
 - ✓ [AA](#) Enterprise Control Room 11.x
 - ✓ Microsoft Access Database Engine 2010
 - ✓ Microsoft Office
- **Accounts / License Needed:**
 - ✓ [AA](#) Enterprise License
 - ✓ [Salesforce account](#)

4. Getting Started

4.1 Skill Matrix

Below is an overview of how the task bots and MetaBots map to these skills:

Skill	Task Files	MetaBot Files
Create Salesforce Account	Salesforce Account CRUD - Ducont Systems.atmx	SalesForce_Ducont.mbot logic: 1) SF_Login 2) SF_CreateAccount
Update Salesforce Account		SalesForce_Ducont.mbot logic: 1) SF_Login 2) SF_UpdateAccount
Read Salesforce Account		SalesForce_Ducont.mbot logic: 1) SF_Login 2) SF_getAccountDetails
Delete Salesforce Account		SalesForce_Ducont.mbot logic: 1) SF_Login 2) SF_DeleteAccount

4.2 Installation Hierarchy

Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

<AA Application Path> 1. My Task 1.1 Bot Store ➤ Error Folder ✓ Logs: a. Error_Log.txt ✓ Snapshots: ✓ Error_Screenshot.png ➤ Input Folder ✓ Config.xlsx ➤ My Tasks ➤ Salesforce Account CRUD - Ducont Systems.atmx ➤ My MetaBots ✓ Salesforce_Ducont.mbot	<AA Application Path> is the location where AA files are stored on your machine 1. My Tasks My Task Folder is the default directory where Bot Files are saved. 1.1 Bot Store Bot Store Folder contains the Bot Name Folder which the installer creates while installation of the Bot. ➤ Error folder is where logs and snapshots of screens will be placed if something goes wrong with the bot during execution ➤ Input Folder is where the input files that the bot needs for execution of the use case is saved My Tasks folder contains all the Developed Platform Source Code My MetaBots folder contains all the metabot files
---	--

4.3 Quick Start

Please check if you have entered the Input details required for the **Excel Filter**, then save the excel.

4.3.1 Setup

Download the bot from Bot Store.

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

4.3.2 Configuration

This section describes various input parameters, lockers and credentials required to work with metabot logic. The sample task bots have been supplied in the package. These task bots are some example of how to use metabot.

Locker Name	Credentials Name	Attribute Name	Value
Salesforce-Ducont	Username	vUserName	Salesforce Username
Salesforce-Ducont	Password	vPassword	Salesforce Password
Salesforce-Ducont	SecureToken	vSecureToken	Salesforce Secure Token

4.3.3 Input Variables:

Input Variable	Type	Mandatory	Purpose	Example Input
vObjectName	Text	Yes	to identify in which object bot should perform activity.	Account
vActivityName	Text	Yes	to identify which activity bot should perform.	READ

5. Log:

In case of Errors, Error Logs & Screenshots are generated within Error Folder

- My Task
 - Bot Store
 - Bot name
 - Error Folder
 - Logs (Folder)
 - a. Error_Log.txt
 - Snapshots (Folder)
 - a. Error_Screenshot.png

5.1 Error Log Information:

- ✓ Task Number
- ✓ Error line Number
- ✓ Error Description

5.2 Error Log Examples:

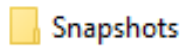
1. Log Example

 Logs Is the place where the Error Log data.

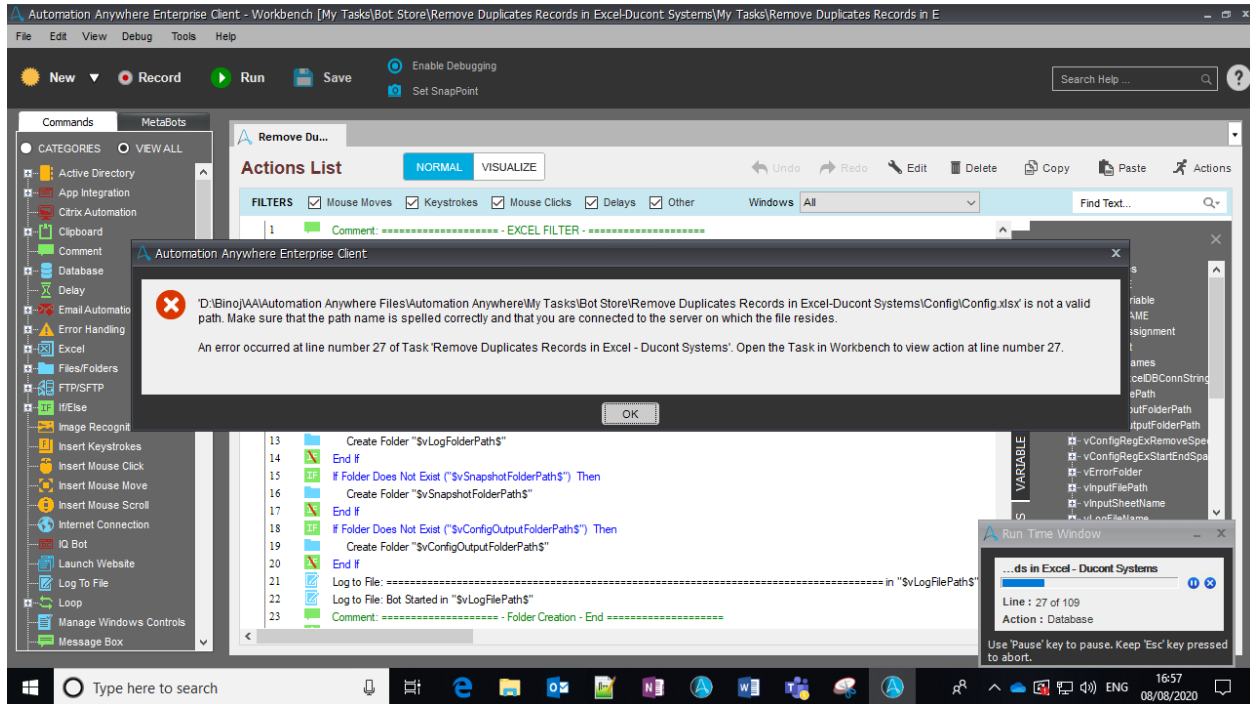
 Salesforce API Account- Ducont Systems_23112020_23223.txt - Notepad

```
File Edit Format View Help
(11/23/2020 11:02:23 PM) =====
(11/23/2020 11:02:23 PM) Bot Started
(11/23/2020 11:02:24 PM) Connected to Config File
(11/23/2020 11:02:24 PM) Extracted config values....
(11/23/2020 11:02:24 PM) Object Name: [Account]
(11/23/2020 11:02:24 PM) Activity Name: [UPDATE]
(11/23/2020 11:02:24 PM) Salesforce login
(11/23/2020 11:02:50 PM) Successfully logged in salesforce
(11/23/2020 11:02:50 PM) Connected to Insert account file
(11/23/2020 11:02:50 PM) account name : [AABot1]
(11/23/2020 11:02:52 PM) account [AABot1] has been updated with id : [0012w00000UP4S5AAL]
(11/23/2020 11:02:52 PM) account name : [AABot2]
(11/23/2020 11:02:53 PM) account [AABot2] has been updated with id : [0012w00000UP4SAAA1]
(11/23/2020 11:02:53 PM) account name : [AABot3]
(11/23/2020 11:02:54 PM) account [AABot3] has been updated with id : [0012w00000UP4SFAA1]
(11/23/2020 11:02:54 PM) account name : [AABot4]
(11/23/2020 11:02:55 PM) account [AABot4] has been updated with id : [0012w00000UP4SKAA1]
(11/23/2020 11:02:55 PM) End
(11/23/2020 11:02:55 PM) =====
```

2. Screen Shot:



Is the place where the Screenshot of the Error.



Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	11/26/2020	Binoj P V	

Appendix B: Acronyms

No.	Acronym	Description
1.	AA	Automation Anywhere
2.	PC	Personal Computer
3.	RAM	Random Access Memory