



# A2019 – Payment Reminder Bot - Cross Sell using DMN and Twilio

Readme

Version 1.0 2/17/2021



# **Table of Contents**

1. Introduction	
1.1 Overview	3
2. Requirements & Prerequisites	4
2.1 System Requirements	
2.2 Prerequisites	5
3. Getting Started	6
3.1 Quick Start	6
3.1.1 Setup	6
3.1.2 Configuration and Use	7
4. Support & FAQs	13
4.1 Support	13
4.2 FAQs	
Appendix A: Record of Changes	14
Appendix B: References	



## 1. Introduction

This document contains all essential information for the user to make full use of this Payment Reminder Bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the bot.

#### 1.1 Overview

A2019 Payment Reminder Bot - Cross Sell using DMN and Twilio API bot can be used to send out payment reminders to customers and cross-sell additional subscriptions.

#### **Use cases**

The key use cases include:

- Payment reminders
- Shipping updates
- Marketing promotions



# 2. Requirements & Prerequisites

## 2.1 System Requirements

Below are the minimum system requirements for running bots as an Enterprise A2019 (Cloud deployed) or Community Edition user on your local machine.

#### **Hardware Requirements**

Device	Processor	RAM	Storage (Free Space)	Network
Machine	Intel Core i5 2.6 GHz	4 GB minimum 8 GB recommended	32 GB	1 GbE
Bot Creator and Bot Runner	No additions to the machine requirements	No additions to the machine requirements	Add 100 through 150 KB per Automation Anywhere script Add 40 through 50 GB per long-term project	No additions to the machine requirement s

#### **Browser Requirements**

The user interface for Automation Anywhere Enterprise is through a browser. Login to your device then login to Enterprise Control Room through a browser.

Browser	Browser Version	Automation Anywhere plug-in version <sup>2</sup>	Supported bot functions by Bot agent version		
Google Chrome <sup>1</sup>	57 or later	11 or 12	2.0.2	1.0.2	1.0.1
Microsoft Internet Explorer	11	N/A	None	Debugger only	All except Credential Vault

<sup>(1)</sup> Google Chrome re-verification

**CAUTION:** Google Chrome requires re-verification of permissions when the Automation Anywhere Google Chrome extension (Version 11.3.3 or later) is updated. If prompted, click **Enable this item** in the Google Chrome message. Alternatively, re-enable the extension through <a href="chrome webstore">chrome webstore</a>. Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.



(2) Google Chrome plug-in versions

A2019 supports Chrome plug-in version 11. If you have other versions installed, you might not be able to record tasks using the **Record** feature or **Capture** action. To resolve this issue, do the following:

- Rename the automation.chrome.agent registry key to automation.chrome.agent.old. The registry key is available at: Computer\HKEY\_CURRENT\_USER\Software\Google\Chrome\NativeMessagingHosts
- 2. Disable all other Google Chrome plug-in versions you have installed, except for version 11.

# 2.2 Prerequisites

- Automation Anywhere Enterprise A2019 setup to run in your machine.
- This bot uses the following Custom packages available on Bot Store:
  - o A2019 Camunda DMN Package
  - o A2019 Twilio Integration Package
- Prior to use of this Bot, a Twilio account trial or paid, needs to be established for the creation of an SID, Auth Token, and establishing an outbound SMS and voice call number. (again, all outlined in the Quick Start section of this guide)
- Camunda Modeler
- Download the Camunda DMN rules file (required to run this Bot) from <a href="here">here</a>. Unzip the folder and store the file in your local system and configure the Bot to refer to the correct folder in your system.



# 3. Getting Started

#### 3.1 Quick Start

#### 3.1.1 **Setup**

For details on Camunda DMN rules file and how to use the package, please refer to this document.

#### **Twilio**

The package is dependent on the Twilio Platform. If you don't already have a Twilio account, set up a trial account here: Sign up for a free trial account here: <a href="https://www.twilio.com/docs/usage/tutorials/how-to-use-your-free-trial-account">https://www.twilio.com/docs/usage/tutorials/how-to-use-your-free-trial-account</a>

You'll need several pieces of data from the Twilio platform which will be mapped as mandatory input for the package to work properly.

- 1. SID Twilio String Identifier:
  - a. Refer to this page on what an SID is and how to access yours on your trial/full account: <a href="https://www.twilio.com/docs/glossary/what-is-a-sid">https://www.twilio.com/docs/glossary/what-is-a-sid</a>

#### 2. Twilio Auth Token:

a. Refer to this page on how to access or change your Auth Token: <a href="https://support.twilio.com/hc/en-us/articles/223136027-Auth-Tokens-and-How-to-Change-Them">https://support.twilio.com/hc/en-us/articles/223136027-Auth-Tokens-and-How-to-Change-Them</a>

#### 3. From Number:

- a. With a Twilio paid account, you actually buy an outgoing number that's used to send and receive text messages and place voice calls
- b. For trial accounts, the number you can use for outbound messages can be found here: <a href="https://www.twilio.com/console/sms/getting-started/build">https://www.twilio.com/console/sms/getting-started/build</a>
  - i. Note: on trial accounts, all messages are prefixed with something like "Trial message from Twilio:" this wouldn't appear when an account is upgraded beyond trial.

#### 4. To Number:

- a. On a trial account, you can only send text messages and place voice calls to confirmed phone numbers (presumably your own)
  - Be sure to verify your number with Twilio before attempting to send a test message. Use the following page to send yourself a test message before using the bot to send a message: https://www.twilio.com/console/sms/getting-started/build



b. On a full account, you can send text messages and place voice calls to any number that Twilio supports.

# 3.1.2 Configuration and Use

Update the following variables while setting up the Bot or pass the values while initiating the Bot run.

	INPUT VARIABLES: Input Variables to be mentioned in this Table					
Variable Name	Туре	Mandatory	Purpose	Example Input		
cSID	Credential	Yes	Twilio String Identifier – see link above on where to access	AC87b6cfa2b18e82af283XXXXc6e8609e (This isn't a real one, but they are similar to this format)		
cAuth	Credential	Yes	Authorization Token required for sending a message	7e8d7394acbc954d6d9d7ac19fa42cb (again, not real, but similar format)		
sToNumber	String	Yes	The number you intend to send a message to. Must be a string, and must be prefixed with the country code.	19372416946 (sample)		
sFromNumber	String	Yes	The number you are sending a message from. Must be a string, and must be prefixed with the country code	12152416946 (Sample)		



sMessageBody	String	Yes	Message body being sent as a text - can be combination	This is the value stored in the column H in the input template spreadsheet
			of literal characters and or variables.	
			(For SMS)	

OUTPUT VARIABLES: Output Variables to be mentioned in this Table.					
Variable Name	Туре	Mandatory	Purpose	Example Output	
sResponse	String	-	The resulting message from the send_message function call. Should be receiving a SID number on success and 'Error message' on error.	7e8d7394acbc954d6d9d7ac19fa42cb (again, not real, but similar format)	

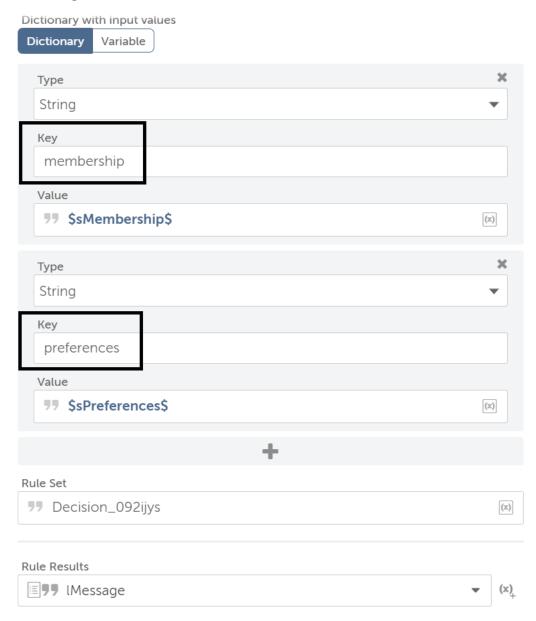
#### Steps:

• Input template should be stored in the location C:\temp, but the bot will place this file if you miss out. Enter Customer Mobile Number in Column B in the spreadsheet:

See the screenshot below to see how the dictionary values are setup to be passed to the DMN engine for processing the rules. Notice the text in the key i.e., membership and preferences

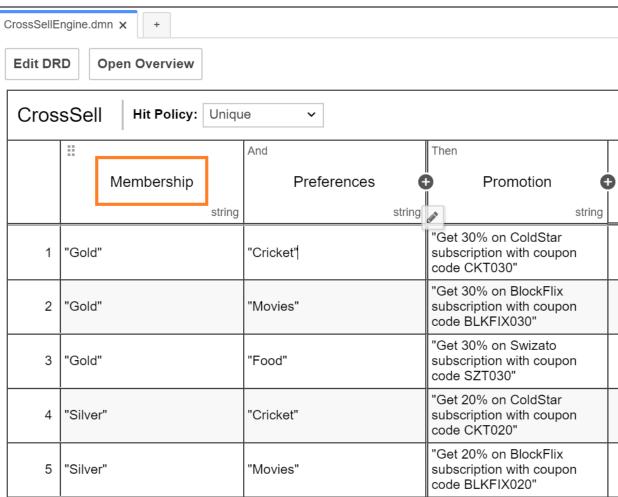


#### DMN Engine: Evaluate DMN Rules File



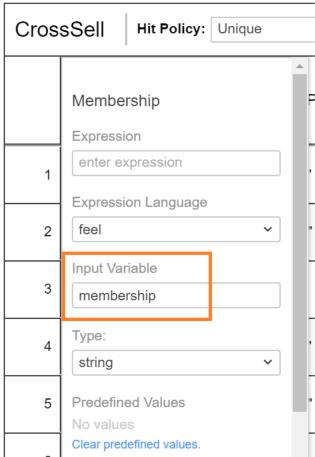
To set the text 'membership' and 'preferences' in DMN file, double click on the 'Membership' section highlighted below





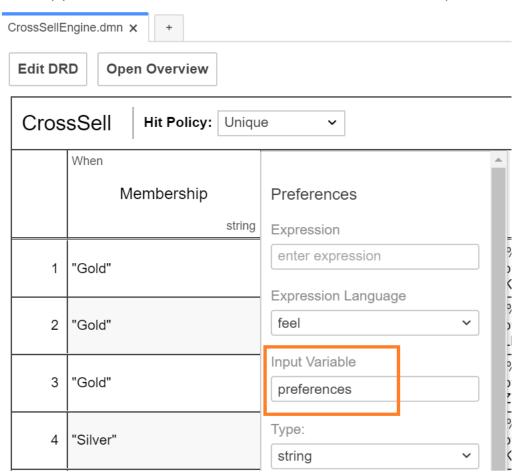


As seen in the screen below, matching text is added in the Input variable field.





Similarly you can click on Preferences section and see the value in Input Variable field.





# 4. Support & FAQs

## 4.1 Support

Free bots and packages are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere
  customers and developers on <u>APeople</u> the <u>Bot Building Forum</u>, the <u>Bot Store Support</u>
  Forum, or the <u>Developers Everywhere Group</u>.
- Automation Anywhere also provides a <u>Product Documentation portal</u> which can be accessed for more information about our products and guidance on <u>Enterprise A2019</u>.

#### 4.2 FAQs

Q: Can I make changes to this bot?

A: Absolutely. Free bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

For questions relating to Enterprise A2019: See the Enterprise A2019 FAQs.



# Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0.0.0	2/17/2021	Arjun S Meda	Initial version of Bot



# Appendix B: References

No.	Торіс	Reference Link
1	Overview of Enterprise A2019	Click <u>here</u>
2	Guidance: Building basic A2019 bots	Click <u>here</u>
3	Guidance: Building A2019 action packages	Click <u>here</u>
4	APeople Community Forum	Click <u>here</u>
5	Automation Anywhere University	Click <u>here</u>