



# **Automation 360 – AARI for Web Credit Card Application Process Readme**

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**Version 1.0**

**4/14/2021**

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# 1. Introduction

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This document contains all essential information for the user to make full use of this Automation 360 Credit Card Application process. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the AARI for Web process.

## 1.1 Overview

The AARI for Web Credit Card Application process is designed to demonstrate how Automation Anywhere's Robotic Interface (AARI) works for engaging bot and human collaboration.

Here is the scenario built with this process: A customer calls up a call center requesting for a credit card. Agent asks the customer for his customer id (assumption: he is an existing customer), looks up the customer details in the CRM, confirms the email id with the customer, send out documents to customer for signing using DocuSign and downloads the signed documents once the customer signs the same.

This bot includes a custom package for DocuSign downloaded from Bot Store.

## 1.2 Use cases

The key use cases include:

- Demonstrating a basic example of how AARI Web can be used in a financial service use case
- Testing/editing a process which uses interactive forms to both read from the form and pre-fill data into a form.
- Learning about 'Go to' action in the process to loop till the required status is achieved for a specific condition

## 2. Requirements & Prerequisites

### 2.1 System Requirements

Below are the minimum system requirements for running bots as an Automation 360 (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 requirements

#### Browser Requirements

The user interface for Automation 360 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

(1) 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 [chrome web store](#). Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.

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## (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:

1. 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 360 setup to run in your machine and AARI license
- Bot creator license
- Set up the AARI process and provide a customer ID to begin testing the bot

Note: This process uses a simulated customer data pre-loaded in an excel spreadsheet to mimic a CRM application (provided along with this process to start with). Use these customer ids to test the process – 1001, 2000 and 3000.

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## 3. Getting Started

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### 3.1 Quick Start

#### 3.1.1 Setup

- Install the Bot from Bot Store into your Control Room
- Navigate to AARI Web – Credit Card Application process folder within the Bot Store folder to examine the installed process, bots, and forms.
- Active DocuSign developer account

##### DocuSign setup details:

- A DocuSign Developer Account <https://developers.docusign.com/>
- A registered App with its Private Key and Integration Key (Client ID). Make sure that grant type is set to “Implicit Grant”
- Your API Account ID and API Username
- **Before you can make any API calls, you must get your user’s consent for your app to impersonate them. This has to be done for every DocuSign app once.** Create a callback URL for the app in the DocuSign console and post the following URL in a browser window before you do the first API call with the package actions. You find more details about this step [here](#).

`https://account-d.docusign.com/password?scope=signature  
impersonation&client_id=<Client ID /Integration Key of the  
App>&redirect_uri=<Callback URL that already exists or you created for this app>`

Quickstart App-1

SAVE

CANCEL

General Info

App Name \*

Quickstart App-1

Integration Key

Your integration key (also known as a client id) is a unique identifier for your app.

aabx

3186e

Authentication

Not sure which settings to use? [Learn more](#)

User Application

☐ Authorization Code Grant

☒ Implicit Grant

Service Integration

DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)

+ GENERATE RSA

+ UPLOAD RSA

Additional settings

Redirect URIs

×

http://localhost:8080/authorization-code/callback

×

http://localhost:8080/ds/callback

×

https://localhost:9090/ds/callback

### 3.1.2 Configuration and Use

Setup the following parameters in the credential vault:

**Locker Name:** DocuSignLocker

**Credential Name:** DocuSignCredentials

**Attributes:**

- DocuSign Base URL: <https://demo.docusign.net> (Sample URL)

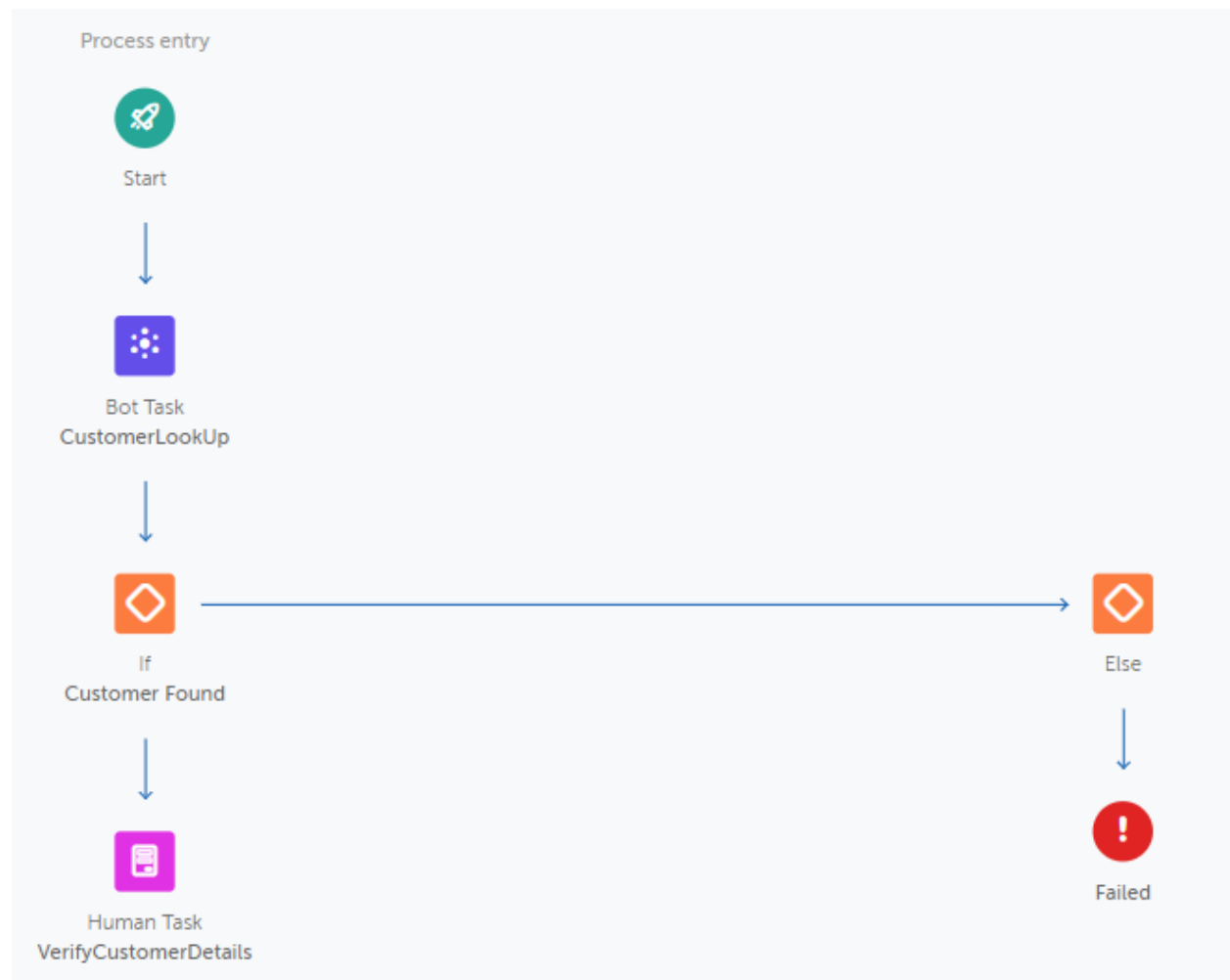
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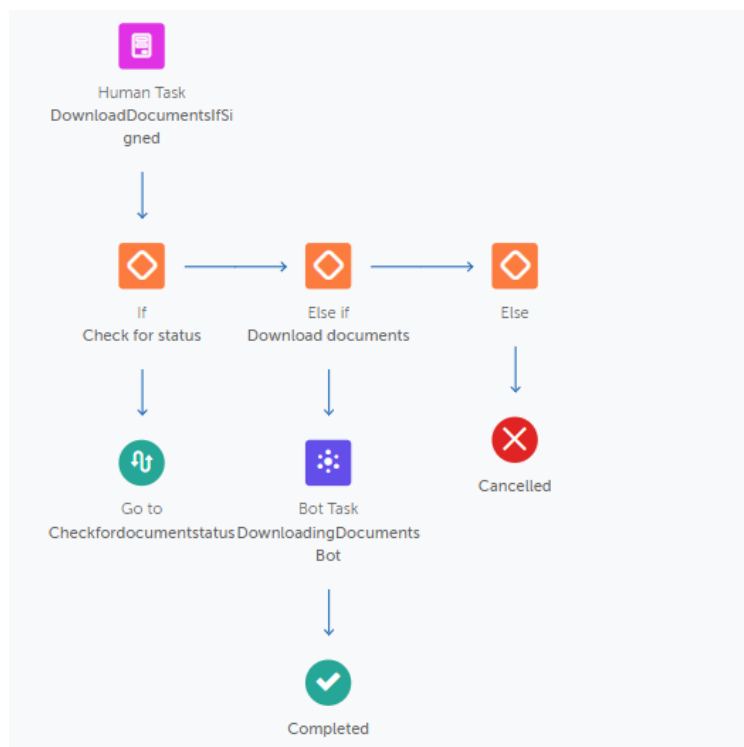
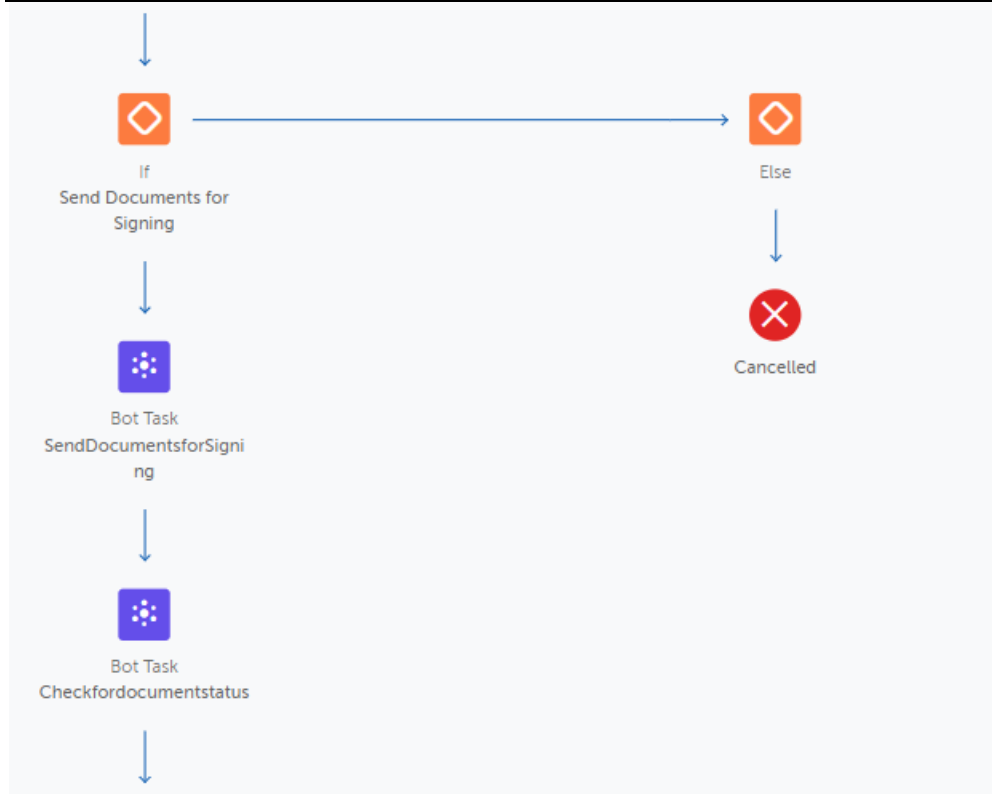
- Account ID
- Client ID
- API User ID
- Private Key

This AARI Web process includes the following assets:

**Process:**

**Credit Card Application process** – This process orchestrates the entire workflow using the bots and forms.





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### **Bots:**

**CustomerLookUp** – This bot accepts the customer id through the initial form and searches for the customer details in the spreadsheet, and creates a PDF file with his information, keeping it ready to be mailed to the customer through DocuSign.

Input – Customer Id (Variable name: sCustomerId)

Output – Output PDF path (Variable name: sDocumentPDFPath)

**Email documents using DocuSign** – This bot emails the PDF file (created by the bot **CustomerLookUp**) to the customer using DocuSign.

Input –

- DocuSign Base URL – Use this if you are using a trial account
- Account Id – DocuSign Account Id
- Client Id – DocuSign Client Id
- API User Id – DocuSign API User Id
- Private Key – DocuSign Private Key
- PDF Document Path (Variable name: sDocumentPath)
- Customer Name (Variable name: sCustomerName)
- Customer Email (Variable name: sCustomerEmail) – For this variable, use your email to test the workflow

Output – Envelope Id (Variable name: sEnvelopId)

**DocuSign Check for Status** – This bot checks the status of the envelope to check if the customer has signed the document.

Input –

- DocuSign Base URL – Use this if you are using a trial account
- Account Id – DocuSign Account Id
- Client Id – DocuSign Client Id
- API User Id – DocuSign API User Id
- Private Key – DocuSign Private Key
- Envelope Id (Variable name: sEnvelopId)

Output – Envelope status (Variable name: sEnvelopeStatus) – Possible status details below

- Sent: Document sent to customer but not yet signed
- Completed: Customer has signed the document

**Download Documents from DocuSign** – This bot downloads the signed documents from DocuSign to the bot runner machine.

Input –

- DocuSign Base URL – Use this if you are using a trial account
- Account Id – DocuSign Account Id
- Client Id – DocuSign Client Id
- API User Id – DocuSign API User Id
- Private Key – DocuSign Private Key
- Envelope Id (Variable name: sEnvelopeld)
- PDF file path to store the signed PDF (Variable name: sSignedDocumentPath)

Output – PDF downloaded in the defined path as defined in the variable sSignedDocumentPath.

### **Forms:**

**CustomerId** – This form is the initial form that accepts the Customer id

**Customer Lookup** – This form displays the customer details to be verified by the agent for up-to information

**Download Signed Documents** – This form displays the envelope status and provides an option to re-check the status, download the documents or cancel the process

### **Template and supporting files:**

- **ApplicantsDetails.xlsx** – This is the spreadsheet with the customer details used to mimic a CRM application

	B	C	D	E	F	G	H	I
1	Customer Name	Address	City	State	Zip	Marital Status	Date of Birth	Phone Number
2	Steven J Hoy	1154 Centennial Farm Road	Sioux City	IA	51101	Married	2/3/1971	9900099000
3	Marilyn R McClung	1446 Pennsylvania Avenue	Rochelle Park	NJ	7662	Single	2/4/1981	8004006652
4	Loretta F Clark	3366 Daffodil Lane	Washington	VA	20011	Divorced	2/5/1991	8888002090
5								

J	K	L	M	N	O
Email Id	Employment Status	Employer Name	Monthly Income	Monthly Payment	Type of Card
<a href="mailto:StevenJHoy@rhyta.com">StevenJHoy@rhyta.com</a>	Employed	Jackfruit Palms	\$8,000	\$2,000	Platinum
<a href="mailto:MarilynRMcClung@einrot.com">MarilynRMcClung@einrot.com</a>	Employed	Jaggery Pictures	\$6,500	\$1,800	Gold
<a href="mailto:LorettaFClark@jourrapide.com">LorettaFClark@jourrapide.com</a>	Employed	Orange Flames	\$3,200	\$450	Silver

- **CreditCardApplication\_Template.docx** – This word document acts as a template with the placeholder text (Ex: AA-DATE, AA-CUSTOMERDATA) to be replaced with the customer information from the ApplicantsDetails.xlsx spreadsheet.



### CREDIT CARD APPLICATION

<b>Date:</b>	<b>AA-DATE</b>
<b>Customer Name:</b>	<b>AA-CUSTOMERNAME</b>
<b>Address:</b>	<b>AA-ADDRESS</b>
<b>City:</b>	<b>AA-CITY</b>
<b>State:</b>	<b>AA-STATE</b>
<b>Zip:</b>	<b>AA-ZIP</b>
<b>Marital Status:</b>	<b>AA-MARITALSTATUS</b>
<b>Date of Birth:</b>	<b>AA-DOB</b>
<b>Phone Number:</b>	<b>AA-PHONENUMBER</b>
<b>Email Id:</b>	<b>AA-EMAIL</b>
<b>Employment Status:</b>	<b>AA-EMPLOYMENTSTATUS</b>
<b>Employer Name:</b>	<b>AA-EMPLOYERNAME</b>
<b>Monthly Income:</b>	<b>\$AA-MONTHLYINCOME</b>
<b>Rent / Monthly Payment:</b>	<b>\$AA-MONTHLYPAYMENT</b>
<b>Type of Card Applying for:</b>	<b>AA-TYPEOFCARD</b>

Customer is expected to sign this document above the text 'Signature' using DocuSign.

**Signature**

**Eagle One Customer Service**  
1111 Tuscan Leather Drive Ste.400E  
Addison, TX 75000-4633  
Ph (972) 419-8888 Fax (972) 499-8888

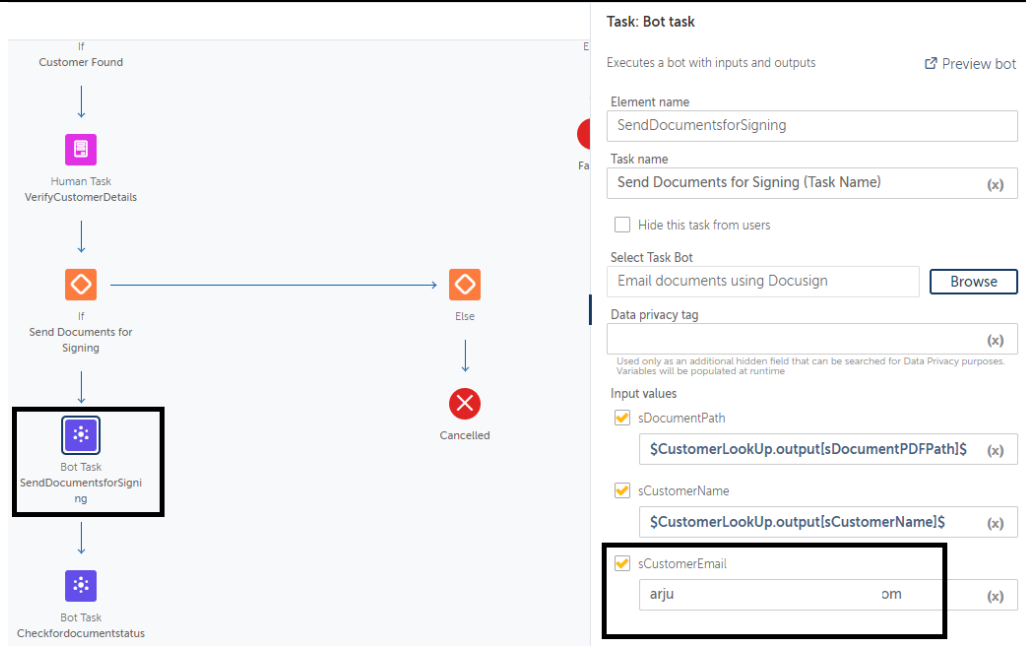
  
**EAGLE ONE  
FINANCIAL**

Eagle Banking Center, 1111 Tucson Leather Dr Ste. 400E, Addison TX 75000-4633

- **WordtoPDF.dll** – This DLL converts a word document to a PDF. This DLL is downloaded from [Bot Store](#). Author credits: [CitiusTech](#).

### **Execution Workflow:**

Before you click 'Run', enter your email id in the Bot task 'SendDocumentsforSigning', field sCustomerEmail as shown below, so that you can receive the email to sign the documents.



Initial form is displayed in which the Customer id needs to be entered. Enter 1001, Click 'Submit'.

Credit Card Application process Provide request information ✕

Enter the Customer Id \*

Enter the 4-digit Customer Id

Submit

Bot executes and displays the information related to the Customer Id. Agent to verify the information and click 'Send' to send an email id to the Customer.

Credit Card Application process ⓘ Request ID : 165 | Title : Enter Customer Id (Request Title)

✓ Request Creation (Task Name)  
Apr 14, 2021 12:00  
Request created arjunbc

✓ Customer Found (Update task name)  
Apr 14, 2021 12:00  
**Completed** BOT

○ Verify Customer Details  
Apr 14, 2021 12:00  
**Pending** arjunbc

Customer Phone Number  
9900099000  
8147585262

Full Name  
Steven J Hoy

Address  
1154 Centennial Farm Road

City  
Sioux City

State  
IA

Zip  
51101

Country  
51101

Marital Status  
Married

Date of Birth  
2/3/71

Email Id  
StevenJHoy@rhyta.com

Employment Status  
Employed

Employer Name  
Jackfruit Palms

Monthly Income  
\$2,000

Rent / Monthly Payment  
\$2,000

Type of Card Applying for  
Platinum

**Send** **Cancel**

Here is the folder structure created in the local system.

#### Input Folder:

← → ▾ ▴		This PC > Local Disk (C:) > temp > CreditCardApplication > Input	
Name	Size		
ApplicantsDetails	9 KB		
CreditCardApplication_Template	112 KB		

#### Output folder:

← → ▾ ▴		This PC > Local Disk (C:) > temp > CreditCardApplication > Output	
Name			
Steven J Hoy			

← → ▾ ▴		This PC > Local Disk (C:) > temp > CreditCardApplication > Output > Steven J Hoy	
Name	Type	Size	
Signed	File folder		
CreditCardApplication_Steven J Hoy	Microsoft Word D...	109 KB	
CreditCardApplication_Steven J Hoy	Foxit Reader PDF ...	153 KB	

Folder 'Signed' will currently be empty.

Once the Agent clicks 'Send' in the form shown above, Bot executes and emails the document to the customer and displays the DocuSign envelope Status as Sent as shown below.

**Credit Card Application process** ⓘ Request ID : 165 | Title : Enter Customer Id (Request Title)

✓ **Request Creation (Task Name)**  
Apr 14, 2021 12:00  
Request created arjunbc

✓ **Customer Found (Update task name)**  
Apr 14, 2021 12:00  
**Completed** BOT

✓ **Verify Customer Details**  
Apr 14, 2021 12:00  
**Completed** arjunbc

✓ **Send Documents for Signing (Task Name)**  
Apr 14, 2021 12:04  
**Completed** BOT

✓ **Check document signature status**  
Apr 14, 2021 12:05  
**Completed** BOT

⌚ **Download Documents If Signed**  
Apr 14, 2021 12:05  
**Pending** arjunbc

DocumentStatus  
sent

Status description for reference  
sent - Document sent for signing but not yet signed  
completed - Document signed, ready for download

Check Status

Download Documents

Cancel

Status is shown as 'Sent' that means the document is mailed to the customer and he is expected to sign the same now. Now ask him to sign the same and confirm once he is done.


From Customer's perspective, here is the email he will receive: As you have entered your email id, check your inbox to see this mail.

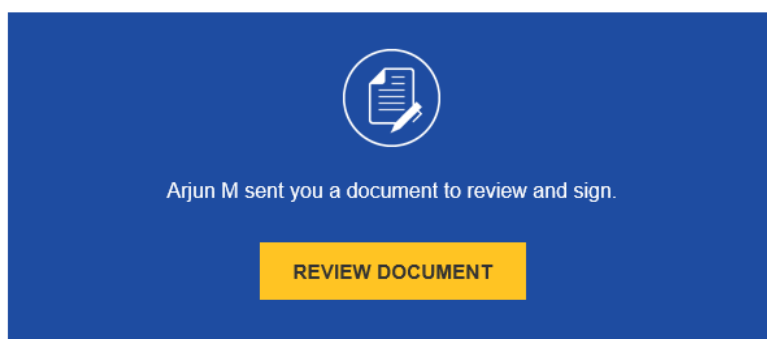
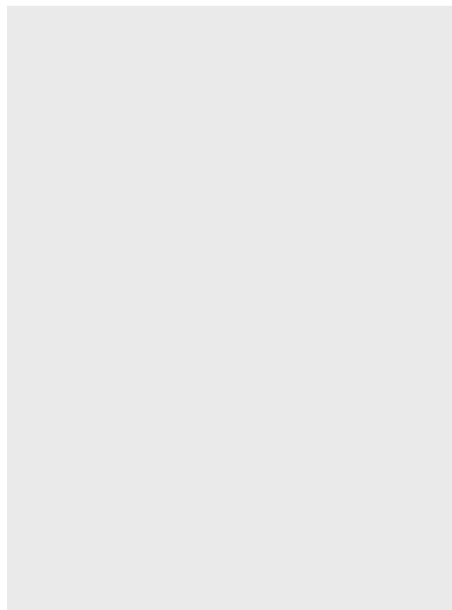
---

Please sign this document



DocuSign Demo System <dse\_demo@docusign.net>  
To: Arjun Meda

 If there are problems with how this message is displayed, click here to view it in a web browser.



Arjun M  
[me](#) [om](#)

Steven J Hoy,

Please DocuSign this document.

Thank You, Arjun M

Click 'Review Document', and you will be presented with this screen. Select the checkbox 'I agree to use electronic records and Signatures'.

#### Request for Signature

 Arjun M  
AA

 Please read the [Electronic Record and Signature Disclosure](#).  
☐ I agree to use electronic records and signatures.

Date:	04-14-2021
Customer Name:	Steven J Hoy
Address:	1154 Centennial Farm Road
City:	Sioux City
State:	IA
Zip:	51101
Marital Status:	Married
Date of Birth:	2/3/71
Phone Number:	9900099000
Email Id:	StevenJHoy@rhyta.com
Employment Status:	Employed
Employer Name:	Jackfruit Palms
Monthly Income:	\$8,000
Rent / Monthly Payment:	\$2,000
Type of Card Applying for:	Platinum



Continue button shows up, click on the same.

#### Request for Signature

 Arjun M  
AA

 Please read the [Electronic Record and Signature Disclosure](#).  
☒ I agree to use electronic records and signatures.



Date:	04-14-2021
Customer Name:	Steven J Hoy

You can see the letter now, scroll down to see the Signature section. Click 'Sign' symbol.

Email Id: StevenJHoy@rhyta.com  
 Employment Status: Employed  
 Employer Name: Jackfruit Palms  
 Monthly Income: \$8,000  
 Rent / Monthly Payment: \$2,000  
 Type of Card Applying for: Platinum

Required - Sign Here  
  
 Signature

**Eagle One Customer Service**  
 1111 Tuscan Leather Drive Ste.400E  
 Addison, TX 75000-4633  
 Ph (972) 419-8888 Fax (972) 499-8888

You will be presented a default signature; you can choose to select the first Preview signature or signature of your own and click 'Adopt and Sign'.

### Adopt Your Signature ×

Confirm your name, initials and signature.

\* Required

Full Name\*

Steven J Hoy

Initials\*

SJH

OR SELECT A SIGNATURE

DRAW


UPLOAD


PREVIEW

[Change Style](#)

DocuSigned by:

DS





A3AE6E33E6D8422...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts – just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN

CANCEL

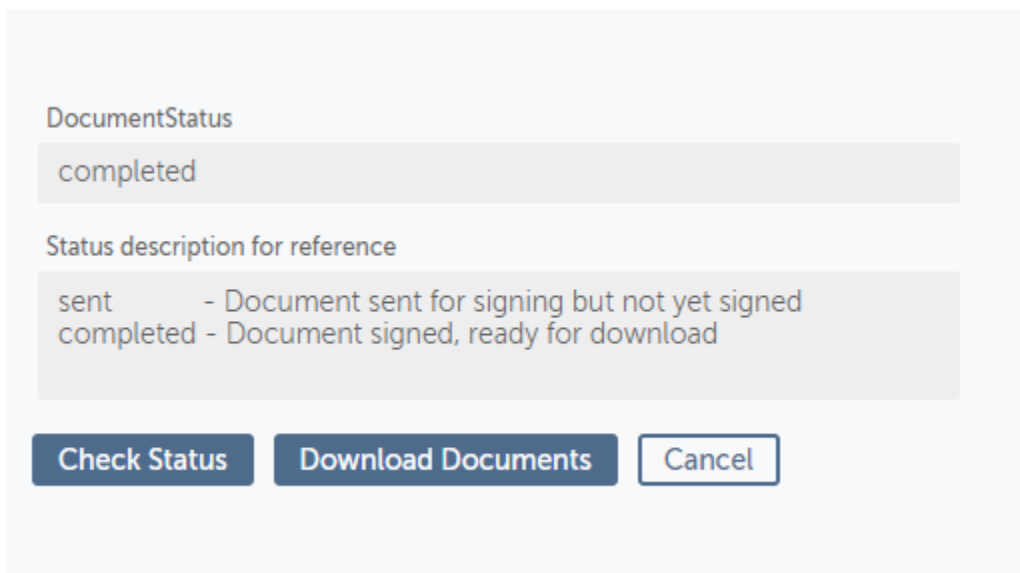
You can see the signature added to the PDF.



Click 'Finish' on the top right side yellow colored button.



Now switch back to AARI and Click 'Check Status'. Bot executes and sends an API request to check the latest document status and returns with the status 'Completed' as shown below.



Click 'Download Documents'. Bot executes and downloads the document from DocuSign.

Request will be updated as Completed as shown below.

165
Enter Custome...
×

**Credit Card Application process** ⓘ
 Request ID : 165 | Title : Enter Customer Id (Request Title)

✓ **Check document signature status**  
 Apr 14, 2021 12:05  
Completed BOT

✓ **Check for status**  
 Apr 14, 2021 12:05  
Completed arjunbc

✓ **Check document signature status**  
 Apr 14, 2021 12:17  
Completed BOT

✓ **Download Documents If Signed**  
 Apr 14, 2021 12:17  
Completed arjunbc

✓ **Downloading signed document**  
 Apr 14, 2021 12:18  
Completed BOT

✓ **Request closed**  
 Apr 14, 2021 12:18  
Completed



Credit card will be shipped within next 2-3 business days.  
  
 Request is closed

Now let's go back to the Windows explorer to see the folder 'Signed'. You will see a PDF file downloaded here.

< > ^ v
 << Local Disk (C:) > temp > CreditCardApplication > Output > Steven J Hoy > Signed

Name	Type	Size
Steven J Hoy_Signed	Foxit Reader PDF ...	283 KB

Open the PDF to verify the document is signed.

<small>DocuSign Envelope ID: 55B17205-F300-4146-99BD-44201D39C68D</small>		<small><b>DEMONSTRATION DOCUMENT ONLY</b> <b>PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE</b> 999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200 <a href="http://www.docusign.com">www.docusign.com</a></small>
 <b>EAGLE ONE FINANCIAL</b>		
<b><u>CREDIT CARD APPLICATION</u></b>		
<b>Date:</b>	<b>04-14-2021</b>	
<b>Customer Name:</b>	<b>Steven J Hoy</b>	
<b>Address:</b>	<b>1154 Centennial Farm Road</b>	
<b>City:</b>	<b>Sioux City</b>	
<b>State:</b>	<b>IA</b>	
<b>Zip:</b>	<b>51101</b>	
<b>Marital Status:</b>	<b>Married</b>	
<b>Date of Birth:</b>	<b>2/3/71</b>	
<b>Phone Number:</b>	<b>9900099000</b>	
<b>Email Id:</b>	<b>StevenJHoy@rhyta.com</b>	
<b>Employment Status:</b>	<b>Employed</b>	
<b>Employer Name:</b>	<b>Jackfruit Palms</b>	
<b>Monthly Income:</b>	<b>\$\$8,000</b>	
<b>Rent / Monthly Payment:</b>	<b>\$\$2,000</b>	
<b>Type of Card Applying for:</b>	<b>Platinum</b>	
   <b>Signature</b>		
 <b>Eagle One Customer Service</b> 1111 Tuscan Leather Drive Ste.400E Addison, TX 75000-4633 Ph (972) 419-8888 Fax (972) 499-8888		

This completes the workflow.

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## 4. Support & FAQs

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### 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 [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Automation 360](#).

### 4.2 FAQs

Q: Can I make changes to this process/bot?

A: Absolutely. Free process/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 Automation 360: See the [Automation 360 FAQs](#).

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## Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0.0.0	4/14/2021	Arjun S Meda	Initial version of the process

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## Appendix B: References

No.	Topic	Reference Link
1	Overview of Automation 360	Click <a href="#">here</a>
2	Guidance: Building basic Automation 360 bots	Click <a href="#">here</a>
3	Guidance: Building Automation 360 action packages	Click <a href="#">here</a>
4	APeople Community Forum	Click <a href="#">here</a>
5	Automation Anywhere University	Click <a href="#">here</a>