

Salesforce Advanced Package

README

Enterprise A2019 (Build 8815)

09/07/2021

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1. Introduction

This document contains all essential information for the user to make full use of this Salesforce Package. It includes a description of the functions and capabilities and step-by-step procedures for Setup & configuration of the Package. This package is used in Salesforce for Create Leads, Account, Opportunity and Contact with basic parameters.

1.1 Overview

- Connect Account and Create Leads
- Create Account Opportunity
- Create Contact in the Platform
- Platform used – IntelliJ IDEA
- Java Language is used to build the code

Steps

5 actions are there:

- **Connect**
 - For authenticating the User.
 - Reads Username, Password, Secret Token, Client ID, and Client Secret from user.
 - User can give custom session name, by 'Default'.
 - Session name should be same for a whole single session.
 - User can also add multiple sessions within a single bot.
 - Returns the result of the authentication in a string variable.
- **Create Lead**
 - For creating Leads in the Salesforce account.
 - Reads First name, Last name, Phone number, Email, Company name, Status, Title from the User.
 - Use the same Session name as in the respective Connect action.
 - Returns the result of the action in a String variable.
- **Create Account**
 - For Creating Account in Salesforce
 - Reads Account name, Account number, Phone number, Place from User.
 - Use same session name as in the respective connect action.

- Returns the result of user creation in a string variable.
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- **Create Contact**
 - For creating Contact in Salesforce.
 - Reads First name, Last name, Phone number, Email, Account ID from User.
 - Use same session name as in the respective connect action.
 - Returns the result of user creation in a string variable.

 - **Create Opportunity**
 - For creating Opportunity Salesforce
 - Reads Opportunity name, Close date, Stage, Probability, Amount, Account ID from user.
 - Use same session name as used in the respected connect action.
 - Returns the result of user creation in a string variable.

1.2 Use cases

The key use cases include:

1. Connecting to the Salesforce platform
2. Create Leads and account opportunity
3. Creating contacts with the basic parameters
4. Easy to use
5. Reliable and efficient

2 Requirements & Pre-requisites

2.1 System Requirements

[A360 \(Cloud deployed\) and Community Edition device requirements.](#)

Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an A360 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

1. IntelliJ
2. Automation 360 installed.
3. Java 11
4. Salesforce Account

3 Getting Started

3.1 Quick Start

3.1.1 Configuration and Use

- User specified input
- Output – variable

INPUT VARIABLES: Input Variables to be mentioned in this Table.					
- TO CONNECT					
Variable Name	Type	Mandatory	Purpose	Direction	Additional Info
SessionName	String	Yes	Contains session name	Input	Mandatory – To Connect Action
vUsername	String	Yes	Contains user's Salesforce User name	Input	Mandatory – To Connect Action
vPassword	Credential	Yes	Contains user's Salesforce login password	Input	Mandatory – To Connect Action
vSecretToken	Credential	Yes	Contains user's Salesforce login Secret token	Input	Mandatory – To Connect Action
vClient_id	Credential	Yes	Contains user's Salesforce login Client id	Input	Mandatory – To Connect Action
vClient_secret	Credentail	Yes	Contains user's Salesforce login client secret	Input	Mandatory – To Connect Action
- TO CREATE LEAD					
vSessionName	String	Yes	Contains session name	Input	Mandatory – To Create Lead
vFname	String	Yes	Contains name of the Lead	Input	Mandatory – To Create Lead
vLname	String	Yes	Contains email of the Lead	Input	Mandatory – To Create Lead
vPhone	String	Yes	Contains phone of the Lead	Input	Mandatory – To Create Lead

vEmail	String	Yes	Contains email of the Lead	Input	Mandatory – To Create Lead
vCompany	String	Yes	Contains company name of the Lead	Input	Mandatory – To Create Lead
vStatus	String	Yes	Contains status of the Lead	Input	Mandatory – To Create Lead
vTitle	String	Yes	Contains title of the Lead	Input	Mandatory – To Create Lead
- TO ACCOUNT CREATION					
vSessionName	String	Yes	Contains session name	Input	Mandatory – To Account Creation
vAname	String	Yes	Contains Account name of the Account	Input	Mandatory – To Account Creation
vAcno	String	Yes	Contains Account number of the Account	Input	Mandatory – To Account Creation
vPh	String	Yes	Contains Phone number of the Account	Input	Mandatory – To Account Creation
vsite	String	Yes	Contains Site of the Account	Input	Mandatory – To Account Creation
- TO CONTACT CREATION					
vSessionName	String	Yes	Contains session name	Input	Mandatory – To Contact Creation
vFname	String	Yes	Contains Account name of the Contact	Input	Mandatory – To Contact Creation
vLname	String	Yes	Contains Account number of the Contact	Input	Mandatory – To Contact Creation
vPhone	String	Yes	Contains Phone number of the Contact	Input	Mandatory – To Contact Creation
vEmail	String	Yes	Contains Site of the Contact	Input	Mandatory – To Contact Creation
vId	String	Yes	Contains Account ID of the Contact	Input	Mandatory – To Contact Creation

- TO CREATE OPPORTUNITY

vSessionName	String	Yes	Contains session name	Input	Mandatory – To Create Opportunity
vName	String	Yes	Contains Account name of the Opportunity	Input	Mandatory – To Create Opportunity
vClose_date	String	Yes	Contains Close Date of the Opportunity	Input	Mandatory – To Create Opportunity
vStage_name	String	Yes	Contains Stage name of the Opportunity	Input	Mandatory – To Create Opportunity
vProbability	String	Yes	Contains Probability of the Opportunity	Input	Mandatory – To Create Opportunity
vAmount	String	Yes	Contains Amount of the Opportunity	Input	Mandatory – To Create Opportunity
vAId	String	Yes	Contains Account ID of the Opportunity	Input	Mandatory – To Create Opportunity

OUPTUT VARIABLES: Input Variables to be mentioned in this Table.

Variable Name	Type	Mandatory	Purpose	Direction	Additional Info
vResult	String	Yes	Returns the output-Connect Action	Output	Mandatory – Returns the result of the action, For Connect Action
vResult	String	Yes	Returns the output	Output	Mandatory – Returns the result of the action, For Create Lead Action
vResult	String	Yes	Returns the result of the action	Output	Mandatory – Returns the result of the action For Create Account
vResult	String	Yes	Returns the result of the action	Output	Mandatory – Returns the result of the action For Create Contact
vResult	String	Yes	Returns the result of the action	Output	Mandatory – Returns the result of the action For Create Opportunity

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:

4.1.1 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](#).

4.1.2 Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Enterprise A360](#).

4.2 FAQs

For questions relating to Enterprise A360: See the [Enterprise A360 FAQs](#).

For questions relating to Enterprise A360: See the [Enterprise A360 FAQs](#).

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1.	1.0	09/July/2021	Denitta Davis	Release Version

Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A360	Click here
2	Guidance: Building basic A360 bots	Click here
3	Guidance: Building A360 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here