

# Outlook Quote Generation For RFQ (Request For Quote)

## Readme

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**Version 1.0**

**25/10/2021**

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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 Outlook Quote Generation For RFQ (Request For Quote) Bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the Bot.

### 1.1 Overview

The Outlook Quote Generation For RFQ (Request For Quote) Bot is designed to automate end to end Quote process for RFQ (Request for Quote) from user and response back to user with completed Quotation.

### 1.2 Use cases

The key use cases include:

- This bot is designed to work for any user by simply plugging this bot into an existing task or new task. The objective of this bot is to automate the process of creating a Quotation for a customer based on the RFQ (Request For Quote). Customer can send the RFQ in Excel format attached as Folder – “Input format” to the Outlook Quote Generation For RFQ (Request For Quote) Bot .
- The bot will download the attachments with subject line as "Request for quote" process the attachments based on the file extension to create Quotation, Send an Email with the generated Quotation file in .xlsx format to the sender. This bot is not going to work for different templates of "Request For Quotation." This bot will work only for Fixed template of (RFQ.xlsx) the control room file attached to the bot in Quotation Template folder.
- **Output folder** consists of EmailDetails.csv file it stores the details of Email Received Date, Email Address and Email Message from the Unread Outlook mail with **subject:“Request for quote”**
- Generate multiples of Quotes and send it via Outlook within a few minutes.
- Easy to access and very efficient.

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## 2. Requirements & Prerequisites

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### 2.1 System Requirements

#### [Automation 360 \(Cloud deployed\) 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 Automation 360 (Cloud deployed) or Community Edition user on your local machine.

### 2.2 Prerequisites

- Automation 360 setup to run in your machine.
- Bot creator license.
- Microsoft Excel
- Microsoft Outlook

## 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 Outlook Quote Generation For RFQ Bot within the Bot Store folder to examine the installed bots.

#### 3.1.2 Configuration and Use

##### Process Flow:

**DOCX – Folder : Input Format – SubFolder** - This sub-folder consists of Input format Example Excel file . The user can send any Excel file in Outlook like the Input Format Example Excel file

**DOCX – Folder : Quotation Template – SubFolder** – This sub-folder consists of Fixed Template file . This template will be filled based on the outlook mail attachments send by the customer in a Excel Format.

**Outlook Quote Generation For RFQ (Request For Quote) – Task Bot** - The task bot automatically generate quotes for the customer mail with subject “Request for quote” and send the completed quotation via Outlook to the respective customer

- Important variables used in the Bot –

<b>VARIABLES:</b>				
<b>Variable Name</b>	<b>Type</b>	<b>Mandatory</b>	<b>Purpose</b>	<b>Value</b>
RootDirectory	Text	Yes	Root directory where the Process related folders exist	C:\ProgramData\AutomationAnywhere\Bots\ Outlook Quote Generation for RFQ
Attachments	Text	Yes	Path where the attachments folder is created	The Input Excel files with a subject - "Request for quote" send by the customers via Outlook
RunLogPath	Text	Yes	Path where the run log file is created and updated	\$LogFolder\$/Log_File.csv
Output	Text	Yes	Path where the Output folder is created	\$RootDirectory\$/Output

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## 4. Support & FAQs

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### 4.1 Support

Free bots 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
<i>1</i>	<i>1.0.0</i>	<i>25-10-2021</i>	<i>Vikashini Guruswamy</i>	<i>Version 1.0</i>



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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>