

Salesforce DataSure AI Agent

Readme

Version 1.0

21/12/2025

Table of Contents

1. Introduction.....	3
1.1 Overview.....	3
1.2 Use Cases	4
2. Requirements & Prerequisites.....	5
2.1 System Requirements.....	5
2.2 Prerequisites	5
3. Getting Started.....	6
3.1 Quick Start.....	6
3.1.1 Setup	6
3.1.2 Configuration	6
4. Support & FAQs	8
4.1 Support	8
4.2 FAQs.....	8
Appendix A: Record of Changes	9
Appendix B: References.....	10

1. Introduction

This document contains all essential information for the user to make full use of [Salesforce DataSure AI Agent](#). It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the [Salesforce DataSure AI Agent](#).

1.1 Overview

[Salesforce DataSure AI Agent](#) enforces data quality and eliminates duplicates in Salesforce.



Salesforce Leads Before Running AI Agent:

Email	First Name	Phone	Last Name	Enrichment St...	Duplicate Score	Country (text ...)	Data Quality Score	Validation Remark	Last Validated On	Actions
raj.sharma@fcs.com	Raj	+91 9876548888	Sharma	New		India			12/19/2025	
raj.sharma@fcs.com	Raja	+91 9876543210	Sharma	New		India			12/19/2025	
rohan.desai@fcs.com	Rohan	987443678	Desai	New		India			12/19/2025	
sneha.k@fcs.com	Sneha		Kulkarni	New		India			12/19/2025	
amit.kapoor12@fcs.com	Amit	(098) 765-4321	Kapoor	New		India			12/19/2025	
amit.patel@yahoo.com	Rohan	(098) 877-6555	Patel	New		India			12/19/2025	
nidhi.s@gmail.com	Nidhi	(098) 877-6555	Sharma	New		Germany			12/19/2025	

Salesforce Leads Before Running AI Agent:

Email	First Name	Phone	Last Name	Enrichment St...	Duplicate Score	Country (text ...	Data Quality Score	Validation Remark	Last Validated On	Actions
raj.sharma@tcs.com	Raj	+91 9876540888	Sharma	New	70	India	100	uplicate: exact email match with another Lead.	12/19/2025	[Icons]
raj.sharma@tcs.com	Raja	+91 9876543210	Sharma	New	70	India	100	uplicate: exact email match with another Lead.	12/19/2025	[Icons]
rohan.desai@gma...	Rohan	987443678	Desai	New	0	India	100		12/19/2025	[Icons]
sneha.k@test.com	Sneha		Kulkarni	New	0	India	50	hone is missing. Email domain is invalid.	12/19/2025	[Icons]
amit.kapoor12@g...	Amit	(098) 765-4321	Kapoor	New	0	India	70	mail domain is invalid. Phone format invalid for India (example: 0987654...	12/19/2025	[Icons]
amit_patel@yahoo...	Rohan	(998) 877-6655	Patel	New	50	India	30	hone format invalid for India (example: 09876543210), Duplicate: exact ...	12/19/2025	[Icons]
nidhi.s@gmail.com	Nidhi	(998) 877-6655	Sharma	New	50	Germany	30	hone format invalid for Germany (example: +49 30 12345678), Duplicat...	12/19/2025	[Icons]

1.2 Use cases

The key use cases include:

This AI Agent can be used to perform data quality and duplicate checks on Salesforce Leads data. With relevant modification this AI agent can be implemented for Salesforce Contacts and Accounts as well.

2. Requirements & Prerequisites

2.1 System Requirements

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

1. Last version Automation Anywhere Bot Agent to be installed on machine.
2. Microsoft Edge browser

2.2 Prerequisites

This AI Agent retrieve data from Salesforce Leads and update leads data post validations.
Hence Make sure you have-

1. Valid Access Token updated in credentials vault to be used by AI Agent to fetch and update Salesforce Leads data.
2. Leads have below 4 additional fields created on Salesforce Leads.

Field Name	Data Type
Data_Quality_Score__c	Number
Duplicate_Score__c	Number
Validation_Remark__c	Text(100)
Last_Validated_On__c	Date

Sample CSV Input Test Data (Create CSV file using below data and import into Salesforce Leads)

FirstName,LastName,Company,Email,Phone,City,Country

Raj,Sharma,TCS,raj.sharma@tcs.com,+91 9876548888,Pune,India

Raja,Sharma,Tata Consultancy Services,raj.sharma@tcs.com,+91 9876543210,Pune,India

Rohan,Desai,Infosys,rohan.desai@gmail.com,987443678,mumbai,india

Sneha,Kulkarni,Google,sneha.k@test.com,,Pune,India

Amit,Kapoor,Gooogle,amit.kapoor12@gamil.com,0987654321,pune,India

Rohan,Patel,Infosys,amit_patel@yahoo.com,9988776655,Mumbai,India

Nidhi,Sharma,Wipro,nidhi.s@gmail.com,9988776655,Jaipur,Germany

John,Doe,ABC Corp,john.doe@abccorp.com,+1 408 123 4567,Berlin,Germany

Jon,Do,ABC Corporation,johndoe@abccorp.com,4081234567,Berlin,Germany

Priya,Mehta,Flipkart,priya.mehta@flipkart.com,,Bangalore,India

Durgesh,Abbad,Flipkart,durgesh.abbad@flipkrt.com,,Bangalore,India

Smith,Johnson,Amazon,smith.johnson@gamil.com,1231,Bangalore,India

3. Getting Started

3.1 Quick Start

3.1.1 Setup

1. Salesforce Access Token Setup

Generate Valid Salesforce Access Token and update it in credentials vault to be used by AI Agent to fetch and update Salesforce Leads data.

Credential key value: Bearer <access_token>

2. Update CSV file (You can access system variable.download folder path to dynamically get folder path and avoid any hardcoded path)

- 2.1. Update taskbot:

Path: AI Salesforce DataSure Agent\Tools\Dependencies\ExportCSVDataToFile

Update sCSVFilePath variable to: <local_path>\ Validated Data.csv

E.g. C:\AI Salesforce DataSure Agent\Validated Data.csv

- 2.2. Update taskbot:

Path: AI Salesforce DataSure Agent\Tools\Dependencies\
ReadValidatedCSVDataFromFile

Update sCSVFilePath variable to: <local_path>\ Validated Data.csv

E.g. C:\AI Salesforce DataSure Agent\Validated Data.csv

2.3. Update Process:

*Path: AI Salesforce DataSure Agent\Tools\ReviewData- Element
'ConfirmationAfterReview', Set 'TextBox0' to <local_path>\ Validated Data.csv*

3.1.2 Configuration and Use

Create below credentials and lockers in Control room.

Locker name	Credential Name	Attribute Name	Value
AI SF DataSure	SFAccessToken	SFAccessToken	Bearer <access_token>
AI SF DataSure	RetrieveSalesforceData_URI	RetrieveSalesforceData_URI	Setup URI in format: {{_endpoint}}/services/data/v{{version}}/query/?q=SELECT%20id,FirstName,LastName,Company,Email,Phone,City,Country%20from%20Lead
AI SF DataSure	SalesforceUpdateAPI_URI	SalesforceUpdateAPI_URI	Setup URI in format: {{_endpoint}}/services/data/v{{version}}/composite/subjects

- For configuring the bot –

No Other Input variable is required to start AI Agent.

OUTPUT VARIABLES			
Variable Name	Type	Purpose	Example Output
sErrorMessage	String	Contains error message if error occurs	Error occurred while sending API request
nErrorLineNumber	Number	Contains error line number if error occurs	11
sSFUpdationStatus	String	Contains status of salesforce data updated	Success/Failed

1. Support & FAQs

1.1 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 the Community in the [Developers Forum](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Automation 360](#).

1.2 FAQs

Demo Video: [here](#)

For questions relating to the Control Room: See the [Automation 360 FAQs](#).

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	<i>V1.0</i>	<i>21/12/2025</i>	<i>Durgeshkumar Abbad</i> <i>(durgesh.abbad@gmail.com)</i>	

Appendix B: References

No.	Topic	Reference Link
2	Guidance: Building basic Automation 360 bots	Click here
3	Guidance: Building Automation 360 packages	Click here
4	Community Developers Forum	Click here
5	Automation Anywhere University	Click here