

Automation Bot for CRM Application using Automation Anywhere Bot Launcher

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Purpose

The key steps to be performed by the bot are:

- Extract customer data from a web portal into a CSV file.
- Open the CSV file and launch a CRM website.
- Populate the CRM webform.
- Save and send the CSV file to the relationship manager.

Prerequisite

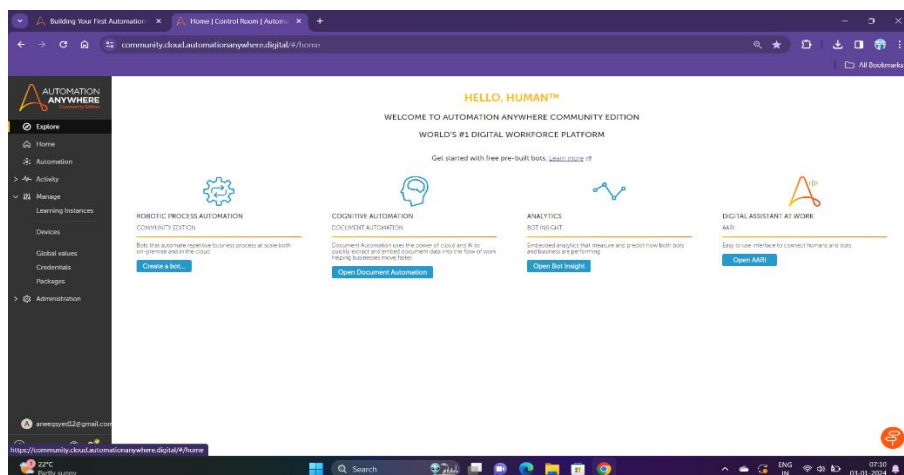
- Access to the Automation Anywhere Community Edition
- Microsoft Excel: You will need to have Microsoft Excel installed for the successful execution of the bot.

Process flow

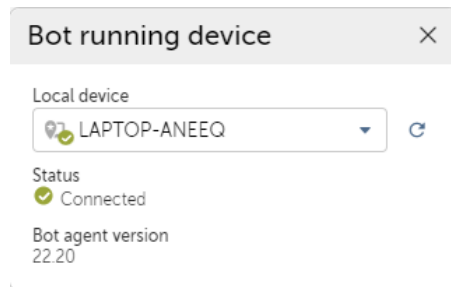
1. Register your device and set user device credentials
2. Create and structure the task bot
3. Step 1: Extract data from a web portal into a CSV file
4. Step 2: Open the CSV file and launch the CRM
5. Step 3: Populate the CRM webform
6. Step 4: Save and send the CSV file to the Relationship Manager
7. Run the task bot

1. Register your device and set user device credentials.

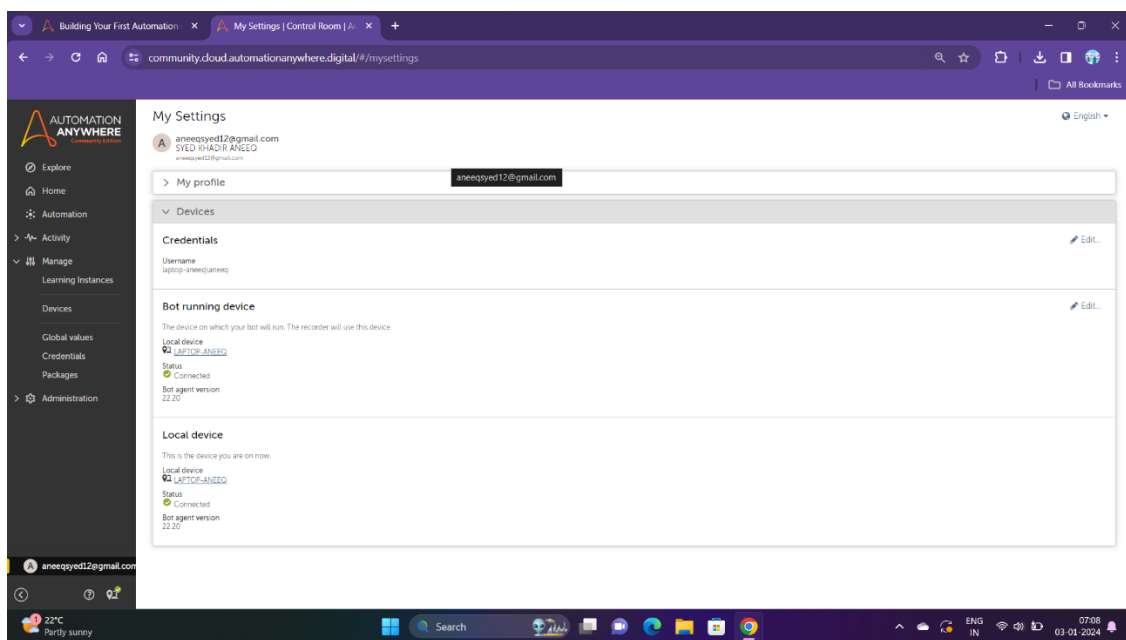
- i. Download the Automation Anywhere Bot agent.
- ii. Login to control room as bot runner user.



- iii. Go to Manage → Devices → Connect local device.
- iv. Connect to my computer → Downloads AutomationAnywhere.exe file automatically
- v. Run the file as administrator from downloads.
- vi. Select Anyone who uses this computer (all users) → Finish.
- vii. Go to Chrome web store → Extensions → Automation 360.
- viii. Click done → Refresh the device page.
- ix. Verify the device is connected by checking green tick mark.



- x. Check the status of both the local device and bot running device in the activity section.
- xi. Navigate to Devices and enter the Device username in the corresponding field. If your username is part of a domain, include the domain within the format domain\username. Click Save changes.



2. Create and structure the task bot

a. Create the bot

Explore → Create a bot → Name: ITBricks → Create and edit.

Create Task Bot

Cancel

Create & edit

Name

ITBricks

Max characters = 50

Description (optional)

Max characters = 255

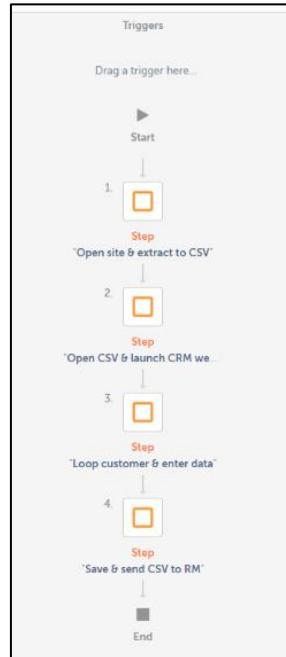
Folder

\Bots\

Choose...

b. Structure the bot

- Search for the **Step** action in the Actions palette and drag and drop the **Step** action to the canvas.
- Enter an appropriate title for the step, in the Action details pane.
- Click Save.



3. Extract data from web table to a CSV file

Launch the IT Bricks holiday packages website.

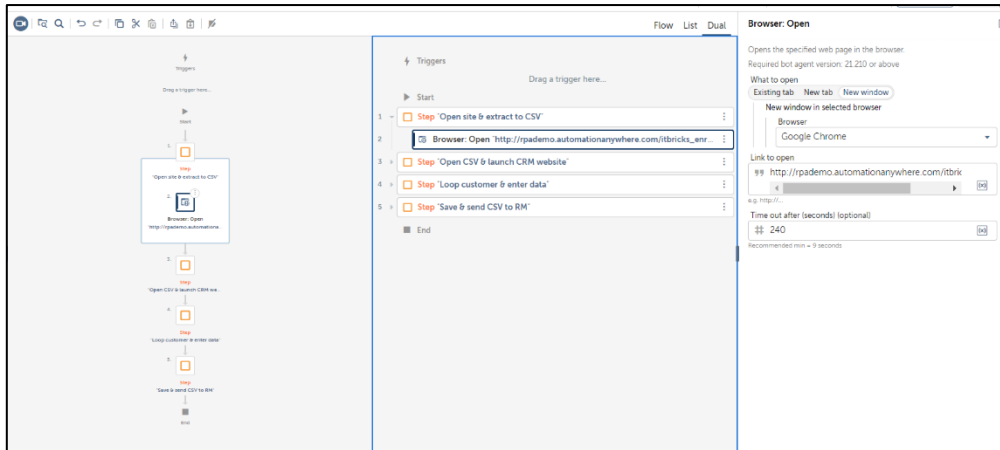
IT Bricks - Holiday Package Customer Report

Customer List

First Name	Last Name	Company	Email	Phone	Country
Addison	Fields	NanoTech	addison.fields@nanotech.com	265-950-5974	Canada
Dan	Gray	PicoTech	dan.gray@picotech.com	712-863-1868	United Kingdom
Gabriel	Wood	PicoTech	gabriel.wood@picotech.com	412-705-5076	Canada
Irma	Rivera	NanoTech	irma.rivera@nanotech.com	448-963-9883	United States
Jack	Graham	MicroTech	jack.graham@microtech.com	554-883-4365	United Kingdom
Leon	Wilson	PicoTech	leon.wilson@picotech.com	409-758-9999	United States
Luke	Hale	PicoTech	luke.hale@picotech.com	590-200-4629	United States
Ritthy	Bailey	PicoTech	ritthy.bailey@picotech.com	623-558-5180	United Kingdom
Sarah	Bryant	PicoTech	sarah.bryant@picotech.com	323-358-2686	United States
Seth	Richards	NanoTech	seth.richards@nanotech.com	276-564-7555	United States

This site is only a demonstration site. It is not an active [Automation Anywhere](#) site.

- Actions → Browser → Open action (drag and drop to Step 1) → Select Browser (Google chrome) → copy the URL http://rpademo.automationanywhere.com/itbricks_enroll.php



- Actions → Recorder → Capture → Application (select link window) → Capture object → Select the object in the tab opened → Select get table in action → Create variable “customers” → Select the “customer” variable in the outcome to a variable.

IT Bricks - Holiday Package Customer Report

Customer List

First Name	Last Name	Company	Email	Phone	Country
Addison	Fields	NanoTech	addison.fields@nanotech.com	265-950-5974	Canada
Dan	Gray	PicoTech	dan.gray@picotech.com	712-863-1868	United Kingdom
Gabriel	Wood	PicoTech	gabriel.wood@picotech.com	412-705-5078	Canada
Irma	Rivera	NanoTech	irma.rivera@nanotech.com	448-983-9883	United States
Jack	Graham	MicroTech	jack.graham@microtech.com	554-883-4365	United Kingdom
Leon	Wilson	PicoTech	leon.wilson@picotech.com	409-758-9999	United States
Luke	Hale	PicoTech	luke.hale@picotech.com	590-260-4629	United States
Ritthy	Bailey	PicoTech	ritthy.bailey@picotech.com	623-558-5180	United Kingdom
Sarah	Bryant	PicoTech	sarah.bryant@picotech.com	323-358-2686	United States
Seth	Richards	NanoTech	seth.richards@nanotech.com	276-564-7555	United States

This site is only a demonstration site. It is not an active Automation Anywhere application.

Recorder: Capture

Main Anchor

Recapture object

Preview

Action to take on object

> Object properties (8 of 48)

Name	Value
Browser type	Google Chrome
Technology type	HTML
Control type	Table
HTML Tag	TABLE
DOMXPath	//form[@name='maiden'],
HTML HasFrame	false
Path	1 -1 -2
HTML FrameSrc	https://rpademo.automat

Set system time out

Basic Advanced

Wait for system response (in seconds)

15

Create variable Cancel Create

Type

Name

Maximum = 50 characters

Description (optional)

Maximum = 255 characters

☐ Use as input
☐ Use as output
☐ Constant (read-only)

Default value (optional)

- Actions → Data table → Write to file action → choose “customers” as data table variable → Enter the filename as C:\buildabot\customers.csv → Check the create folder → overwrite existing file → Encoding ‘ANSI’.

Data Table: Write to file

Writes a data table into a specified file
 Required bot agent version: 20.11 or above

Data table name
 (x) +

Enter file name
 (x) Browse...
Required extensions: ".csv", ".txt"

☒ Create folders/files if it doesn't exist

When writing
☐ Append to the existing file
☒ Overwrite existing file

Row delimiter

Column delimiter

Encoding

- Actions → Browser → Close action → window browser → select browser tab → Run.

Triggers
 Drag a trigger here...

1 ▶ Start

2 ▶ Step "Open site & extract to CSV"

3 ▶ Browser: Open 'http://rpdemo.automationanywhere.com/itbricks_enroll.php'

4 ▶ Recorder: Capture Get entire table for table in the 'IT Bricks - Holiday Customer Report - Goo...

5 ▶ Data Table: Write to file 'c:\buildabot\customers.csv' from data table \$Customers\$

6 ▶ Browser: Close window of tab 'IT Bricks - Holiday Customer Report'

7 ▶ Step "Open CSV & launch CRM website"

8 ▶ Step "Loop customer & enter data"

9 ▶ Step "Save & send CSV to RM"

End

Closes a browser window or tab (Supported browsers only).
 Required bot agent version: 21.210 or above

What to close
 Tab Window All browsers

Closes the window that the tab sits in

Browser tab
 Browser Variable

(x)

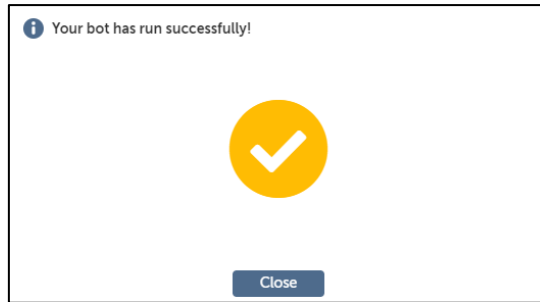
Browser title
☒ IT Bricks - Holiday Customer Report

☒ Case sensitive

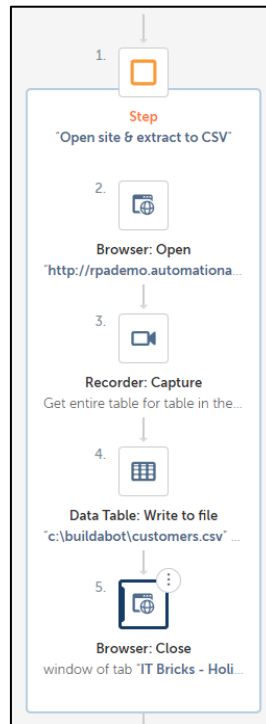
Link of web page

Browser application

Time out after (seconds) (optional)
 (x)
Recommended min = 9 seconds

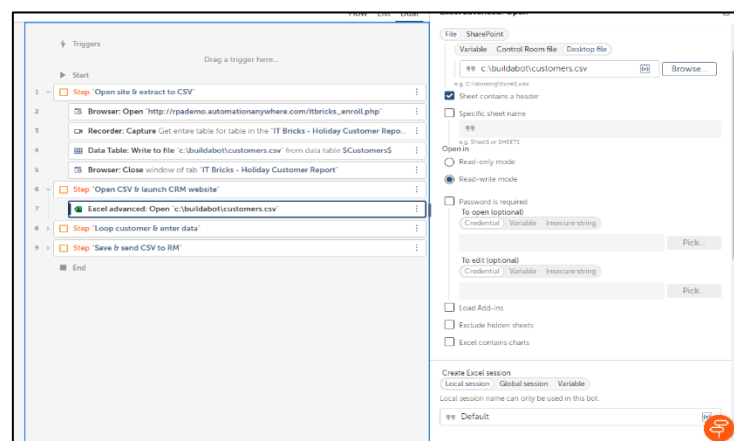


The flow of actions involved in this step is given below,

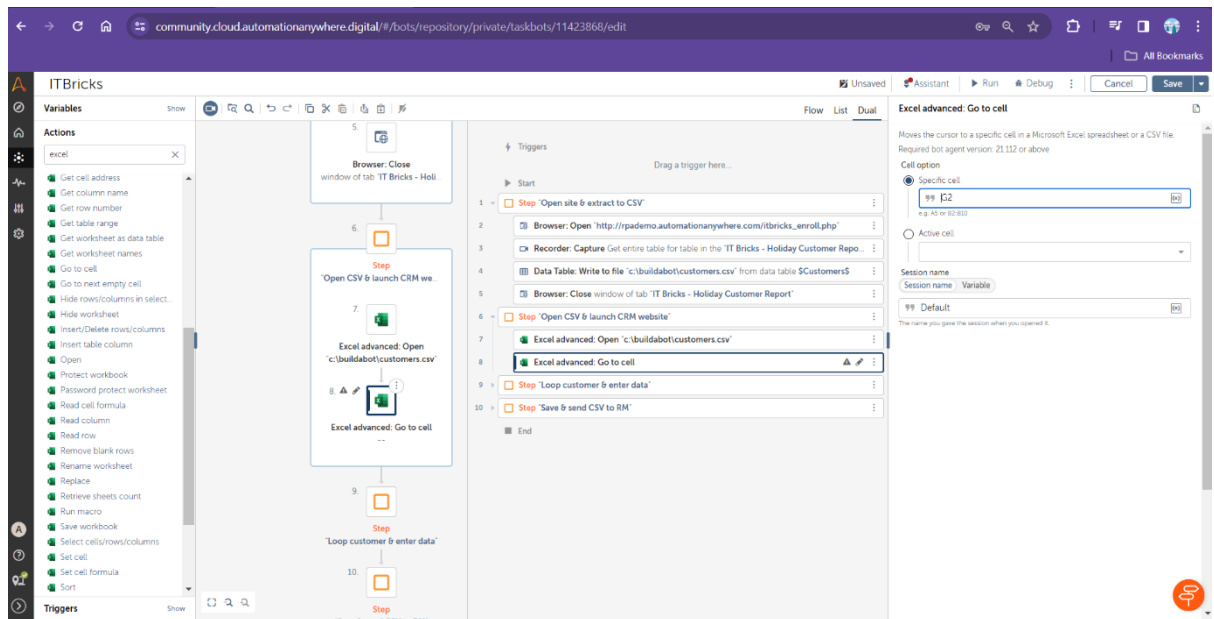


4. Open the CSV file and launch CRM

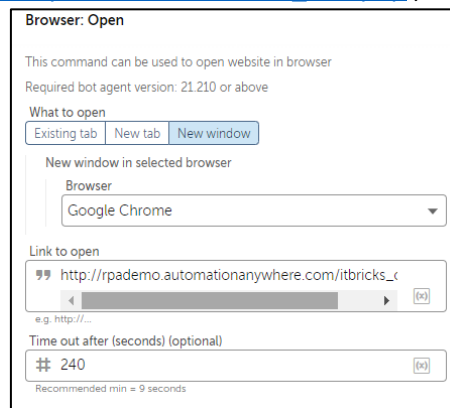
- Action → Excel advanced: open → Desktop file → enter the name of the file (c:\buildabot\customer.csv) → Read/write mode → Sheet contains header → Local session Name: default → save.



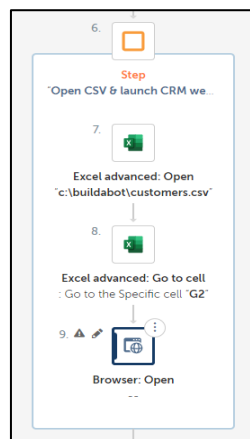
- Opens the spreadsheet & position the cursor in position G2 file to add from these.
- Action → Excel advanced: Goto cell → Specific cell G2.



- Action → Browser → Open → New window → Google chrome (paste the URL http://rpademo.automationanywhere.com/itbricks_crm.php) .

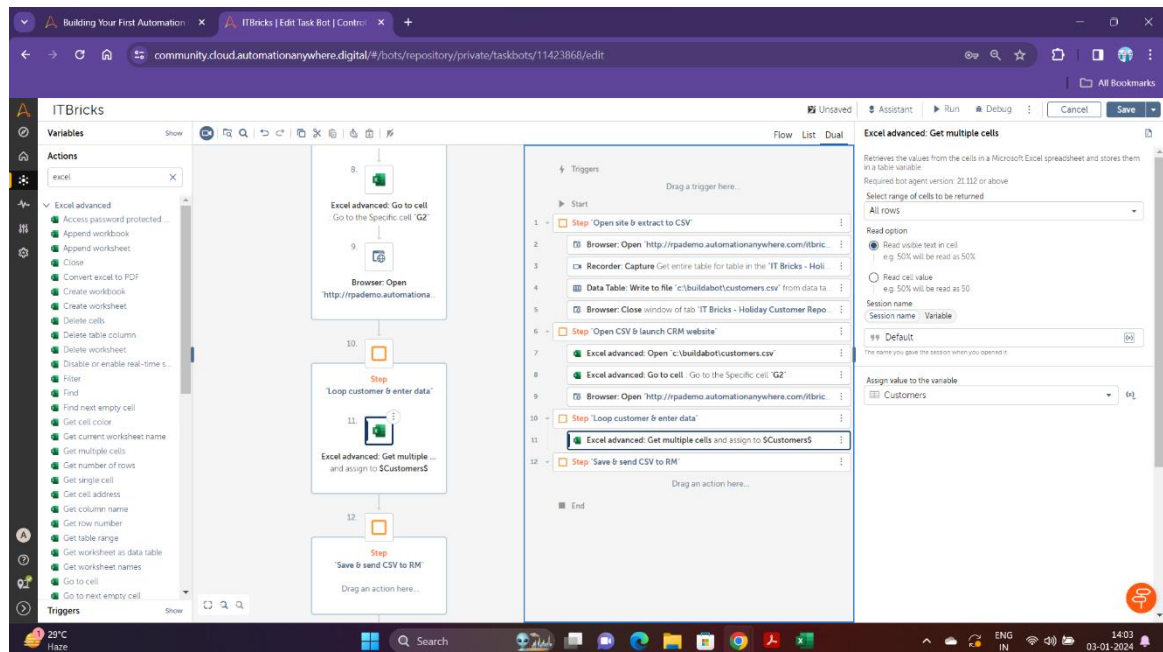


- Click on the 3 dots icon and click run → save and run. The flow of actions involved in this step is given below,



5. Populate the CRM webform

- Action → Excel advance: Get multiple cells → Assigning the value to variable "customers"



Create variable

Type: Record

Name: CustomerRow Description (optional): One row in a table

Maximum = 50 characters Maximum = 255 characters

☐ Use as input

☐ Use as output

☐ Constant (read-only)

☐ Set schema

Name and type fields will be required to match specified schema when assigning values to this variable

Default value (optional): This record is empty

Add

IT Bricks

Holiday Package Registration

First Name:

Last Name:

Company Name:

Email Address:

Phone Number:

Country:

Register Clear Form

This site is only a demonstration site. It is not an active [Automation Anywhere](#) site.

- Action → loop → Iterator → Data table: For each row in table → Table variable: customer → Create the variable under the assign the current row to this variable → Name: CustomerRow → Action → Recorder → window: Application → CRM webpage → Capture object → click

the name box → Action: to take an object → set text → keystrokes {x} → choose variable
 “CustomerRow” → Record: By name (first name) → Insert.
 (Repeat the same process for last name, company, email, phone, company)

The top screenshot shows the ITBricks interface with a workflow for capturing data from a CRM webpage. The workflow includes steps for opening a browser, capturing data from a table, and saving it to a CSV file. The right panel shows the 'Recorder: Capture' action with a preview of the CRM webpage and a list of object properties.

The bottom screenshot shows the ITBricks interface with a similar workflow, but with a focus on capturing specific data points like first name, last name, company, email, and phone number from a CRM webpage. The right panel shows the 'Recorder: Capture' action with a preview of the CRM webpage and a list of object properties.

- Action → Recorder: capture → window application → CRM webpage tab → Capture object → Click on Register button → Action: to be taken on object click.

Recorder: Capture

Captures an action for automation.
Required bot agent version: 21.210 or above

Window

IT Bricks - New Holiday Club Signup

Browser title

IT Bricks - New Holiday Club Signup
Use * as a wildcard

Link of web page
 https://rpademo.automationanywhere.com/itbricks_crr

Browser application
 Google Chrome

☐ Resize window
May improve bot accuracy

Main Anchor

Preview

- Action → Recorder: capture → window Application → CRM webpage tab → capture object → click on user info saved → Action: to be taken on object (Get property → Property name → HTML innertext) → Save the outcome to the variable create → “Status” variableType: String.

Action to take on object

☐ Run in background
A person who is logged in on the device can perform tasks while this action takes place

Property name
 (x)

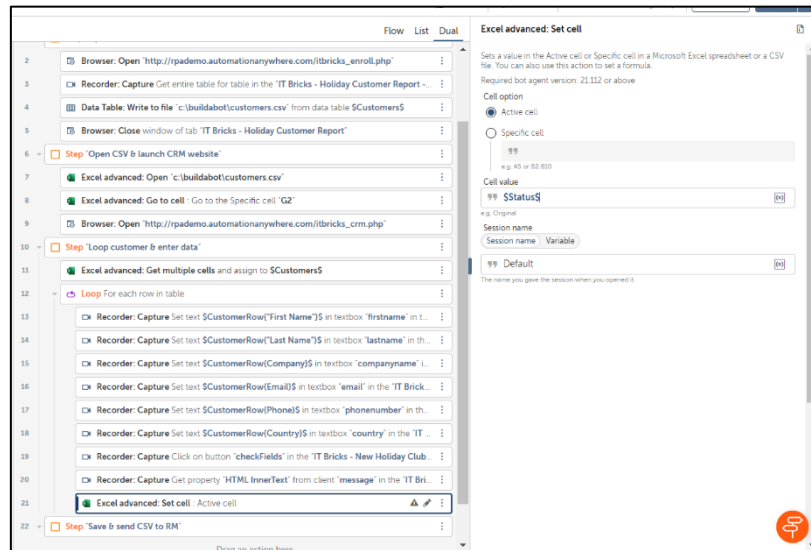
> Object properties (8 of 47)

Name	Value
Control Type	CLIENT
Technology Type	HTML
Browser Type	CHROME
HTML Tag	HTML DIV (x)
DOMXPath	//div[@id='message'] (x)
HTML ID	message (x)
HTML HasFrame	false (x)
Path	1 -1 2 (x)
HTML FrameSrc	js://rpademo.automationa (x)

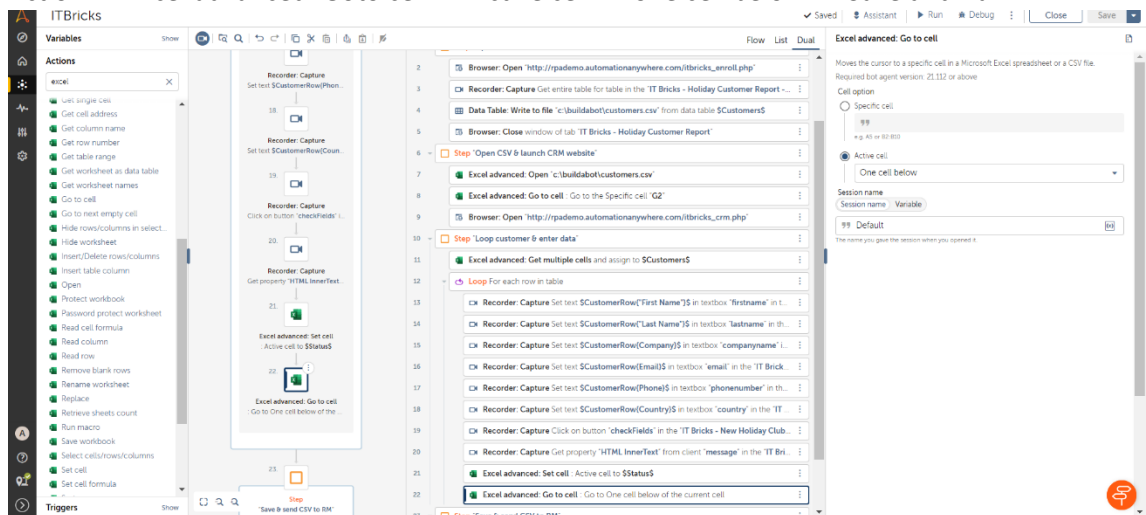
Keep trying for (seconds)
 (x)
How long we'll search for the object (time out)

Save the outcome to a variable
 (x)

- Action → Excel Advanced: set cell → Active cell → Cell value “Status”.

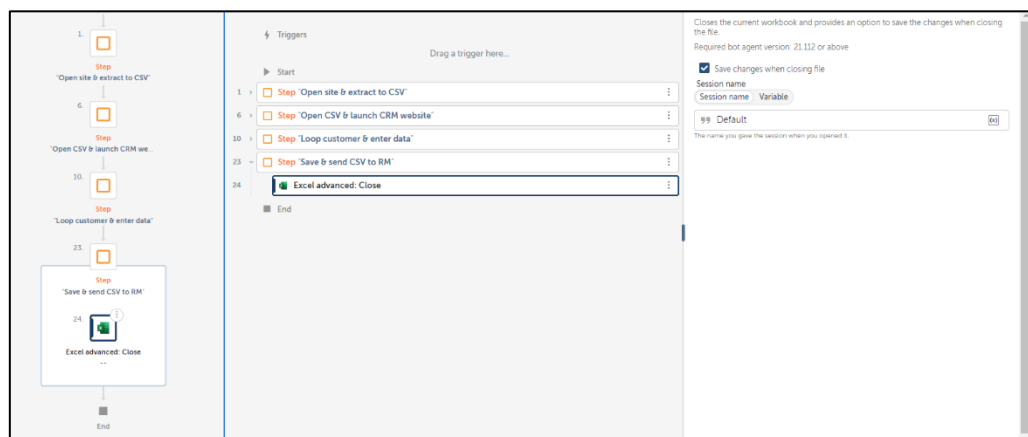


- Action → Excel advanced: Goto cell → Active cell → one cell below → Save and Run.

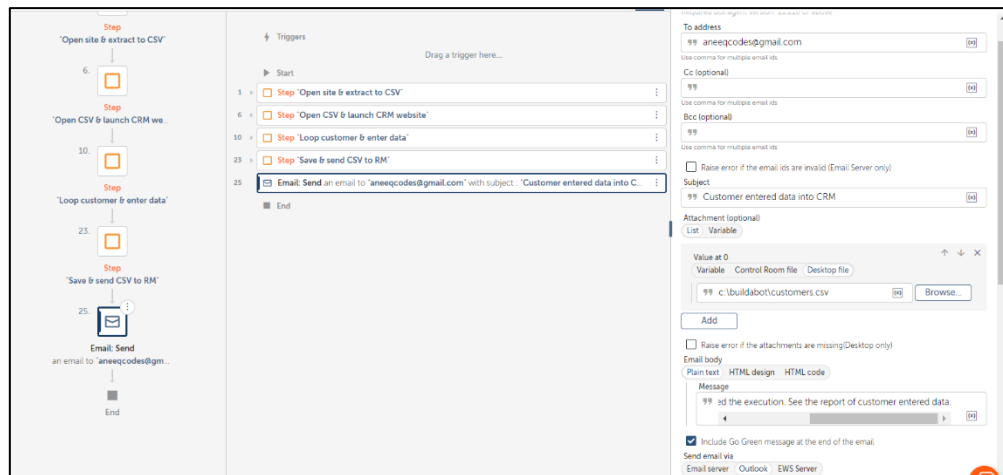


6. Save and send the CSV file to the Relationship Manager

- Action → Excel advanced: Close → Check saves changes when closing file.



- Action → email → send → Enter to address (aneeqcodes@gmail.com) → Subject Attachment → list → Add → Desktop file c:\buildabot\customers. Enter the required message. → Choose outlook as send email via. → Save and run.

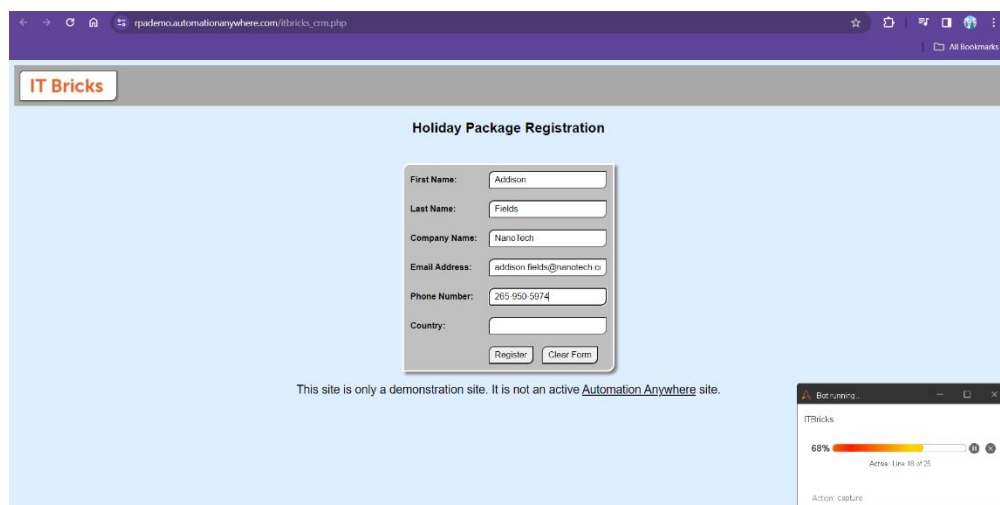


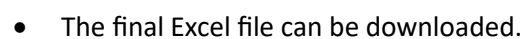
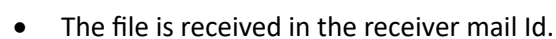
7. Run the Bot

- Close all the spreadsheets on the device. Make sure that there is no incomplete task in the work bot structure.



- It runs for all the customers input data and mails the CSV file.



[illegible]

The final structure for the bot is given below.



.....THANK YOU.....