Mail and File Handling Automation in StudioX

Email Automation in StudioX

StudioX enables you to automate tasks you perform with emails from the Outlook desktop application, Gmail, and Outlook 365.

Email Automation helps to:

- **Reduces repetitive tasks:** Freeing up the marketing team's time.
- **Personalization:** Making the customers feel as if they're more than another face in the crowd with unique messaging.
- **List segmentation:** Allows you to deliver relevant content to the right readers or white users.

UiPath Email Automation can automate the several task like sending reminder emails, sending birthday or anniversary wishes, sending the emails to get the feedback on products, services and updates, deleting emails, downloading the attachments in folders etc.

The **UiPath.Mail.Activities** pack is compatible with the following Microsoft Outlook versions:

- ✓ 2010
- ✓ 2013
- ✓ 2016
- ✓ 2019
- ✓ Office 365

Mail card has two subcategory in the activity panel:

1. **Resources:** It helps you to authenticate or communicate with the Application first that on which you want to perform the automation.
2. **Actions:** It provides set of activities to automate the each of Email Applications.

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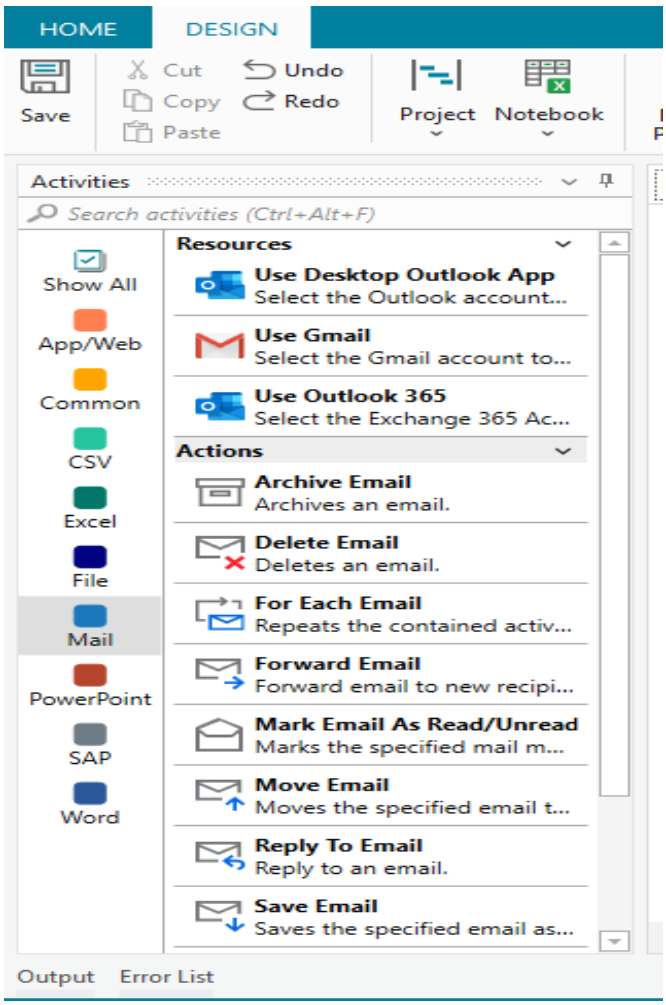
Email Activities in UiPath StudioX:



Demonstrating the Email Automation:

Use Case : HR Download Candidates Resumes

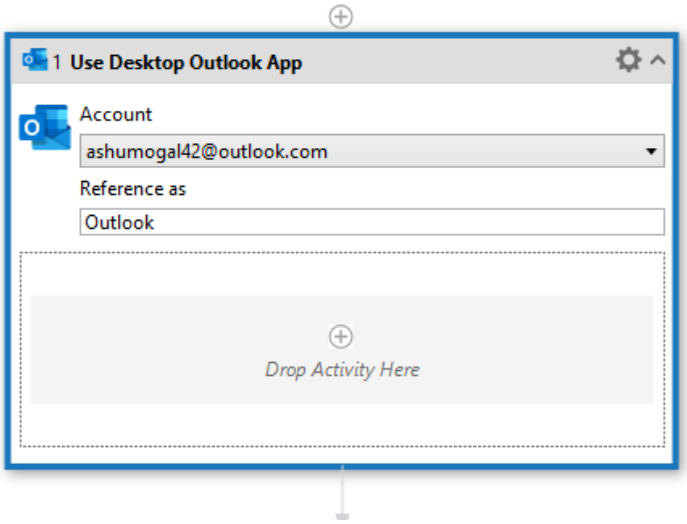
Iterate through Outlooks Mails and Save Attachments

1. Read Email from Desktop Outlook App (Inbox Folder)
2. Filter Emails with 1 or more Attachments
3. Download attachments from the Email in Local Folder.

Using the **Use Desktop Outlook App** Activity from the resource section to perform the Outlook Email Automation

Configuring the activity

- **Account** - StudioX automatically selects the default Outlook account. You can select another personal account or shared mailbox from the drop-down menu.
- **Reference as** - Enter a name by which to refer to the Outlook account in the automation project.



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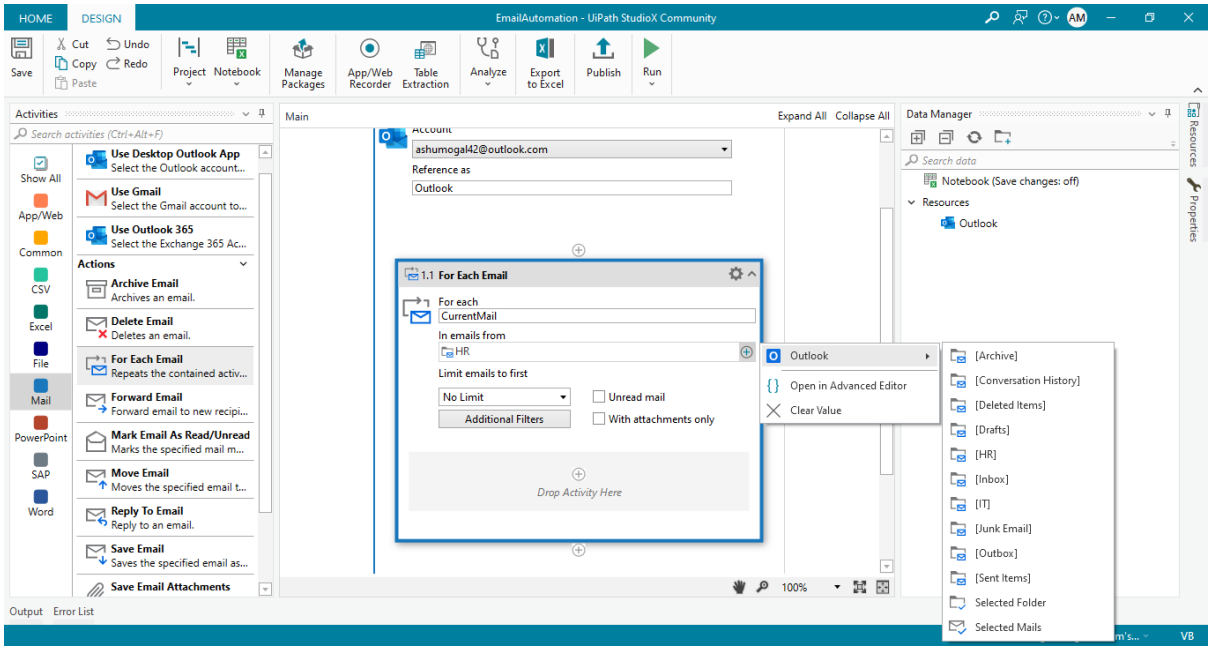
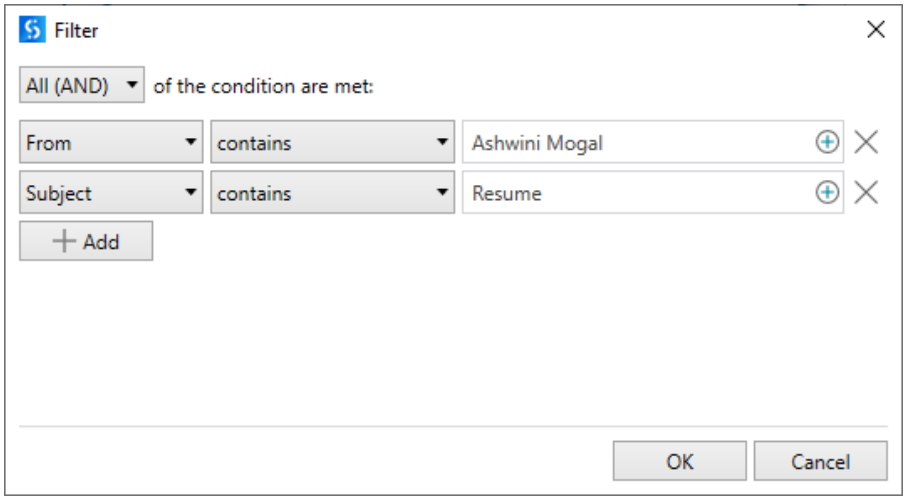
For Each Email Activity- Executes one or more activities for each email in an Outlook folder or in a selection of messages. This activity must be added inside a **Use Outlook Account** activity.

Configuring the activity:

- **For each** - Enter the name by which to refer to the current email in the iteration.
- **In emails from** - choose Selected Mails or Selected Folder to use the messages or the folder selected in Outlook when the project is executed.
- **Limit emails to first** - Enter or select a limit for the maximum number of emails to process. Set a lower limit if you want to reduce processing times. The default value is 100 emails.
- **Unread mail** - Select this option if you want to process only unread emails. This option is not selected by default.



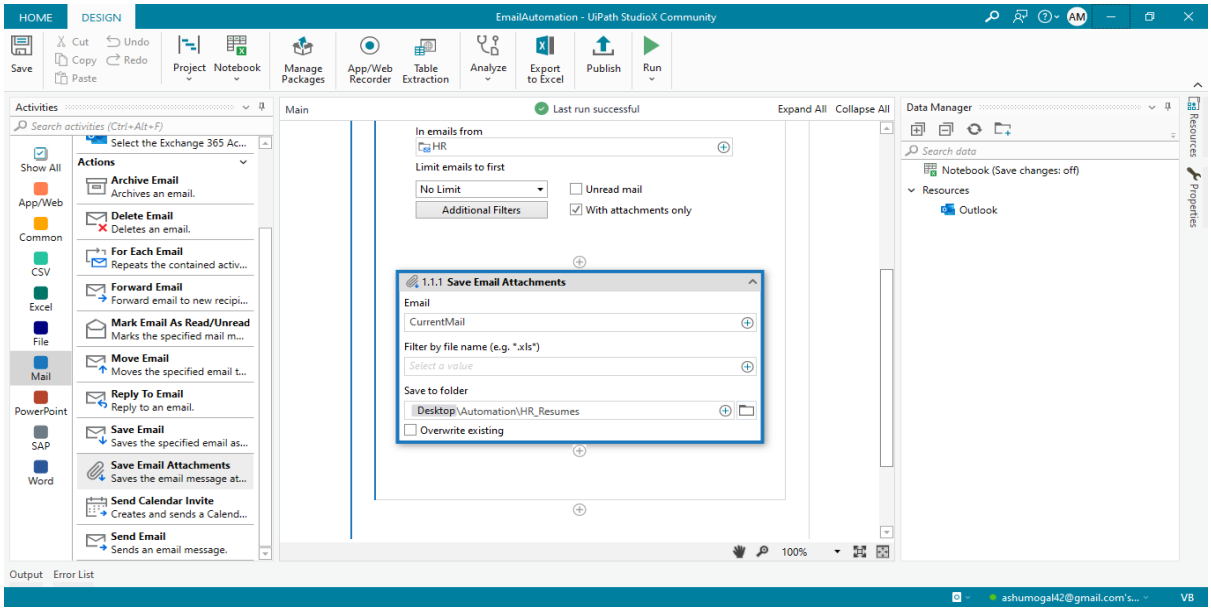
Adding the Custom filters based on Email **From & subject** line.



Save Email Attachments Activity - Saves the attachments of a mail message to a specified folder on your computer. Should be used for the currently selected email, or while iterating through a list of emails.

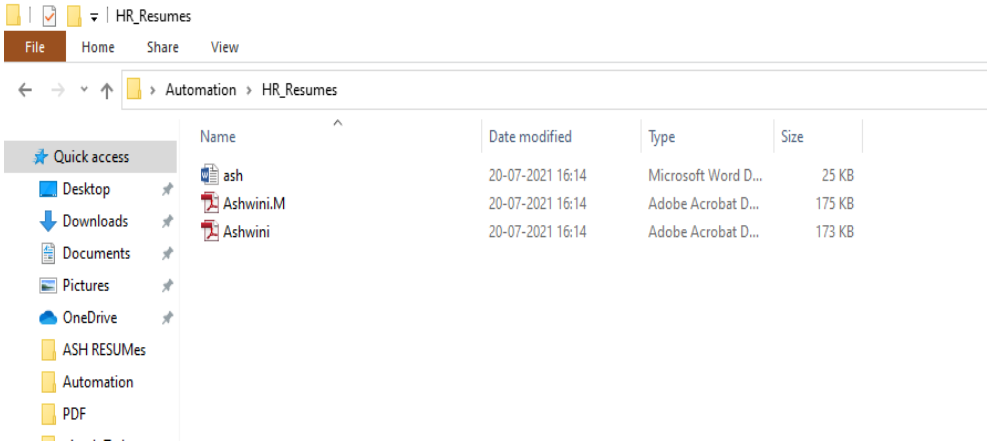
Filter by - (Optional) Click + on the right side of the field, and then, from the menu, indicate how to filter the attachments. For example, to only save PDF attachments, select **Text** and then enter *.pdf.

Save to folder -Select the folder where to save the attachments.



Before Running the Bot make sure your **Outlook is installed** on your system and it does not have to be kept open it should be kept closed.

Expected Output:



Send Mail Activity:

Send mail is a general **purpose internetwork email routing facility** that supports many kinds of mail-transfer and delivery methods, including the Simple Mail Transfer Protocol (SMTP) used for email transport over the Internet.

Sends an email from the specified email account. This activity must be added inside a Use Outlook 365**,** Use Gmail, or Use Desktop Outlook App activity.

Configuring the Activity:

- **Account** - Click Plus and then, from the drop-down menu, select an Outlook 365, Gmail, or desktop Outlook account added to the automation.
- **To** - Click **Plus** and then use one of the options in the menu to select the recipient of the email – Use Saved Value, Ask when run , Paste from clipboard ,Open in Advanced Editor,

  Text - Enter one or more email addresses separated by semicolon (;) in the Text Builder.

- **Cc** - select the secondary recipients of the email.
- **Subject** - add a subject for the email.
- **Attachments** - Select **Files** to attach individual files or **Folder** to attach all the files in a folders.
- **Save as draft** - If selected, the email is saved in the Drafts folder instead of being sent directly to the selected recipients, giving you a chance to check the email before sending it. This option is selected by default.

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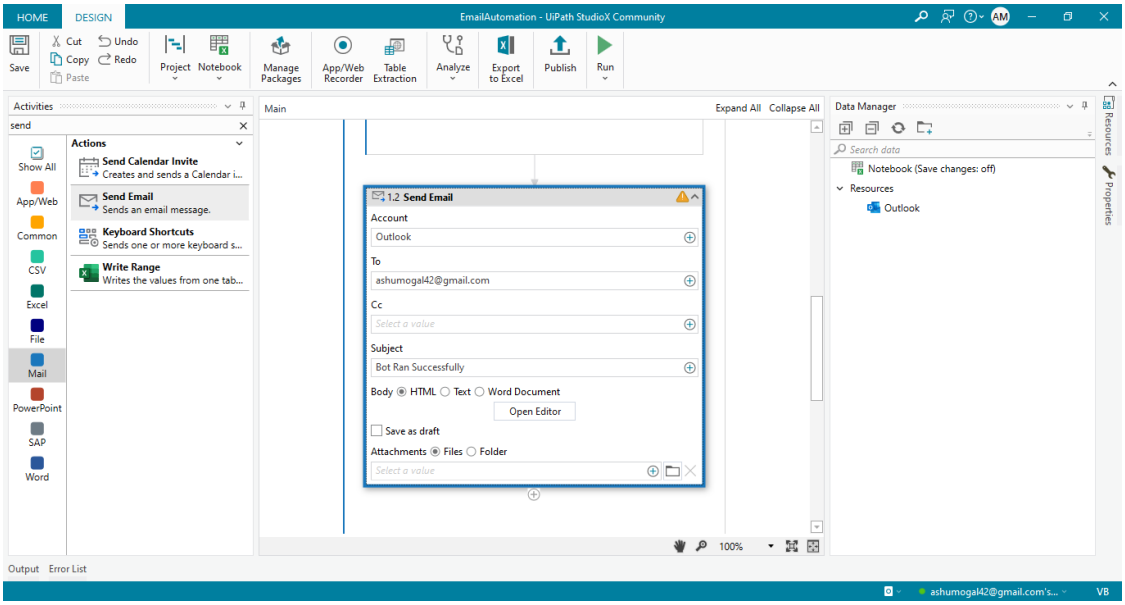

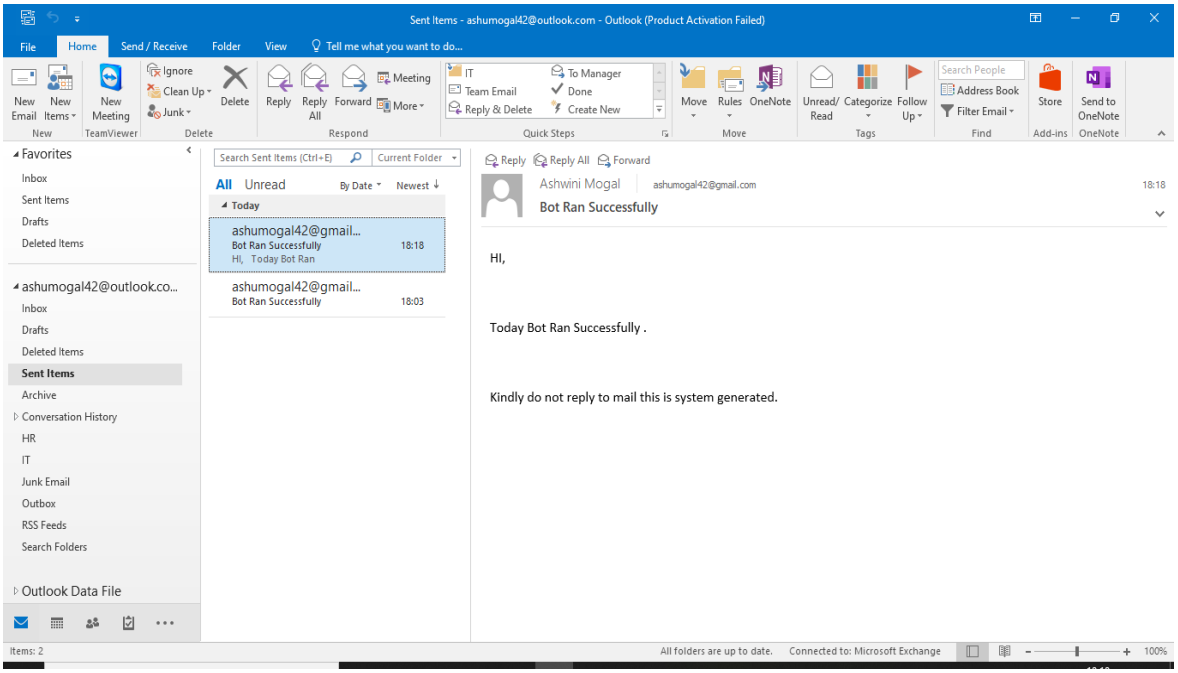

File Automation

File automation refers to the automation of tasks you perform with files and folders on your computer, such as creating, copying, or renaming files and folders. StudioX comes with multiple activities that automate tasks you perform with files and folders.

File card has the different actions in the activity panel that provides set of activities to automate the Files and Folders.

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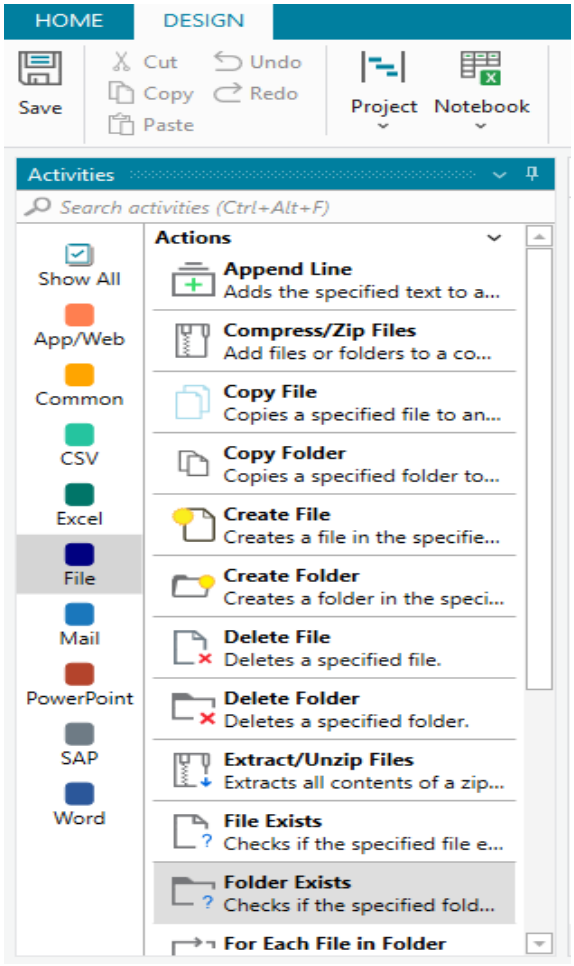
File Activities in UiPath StudioX



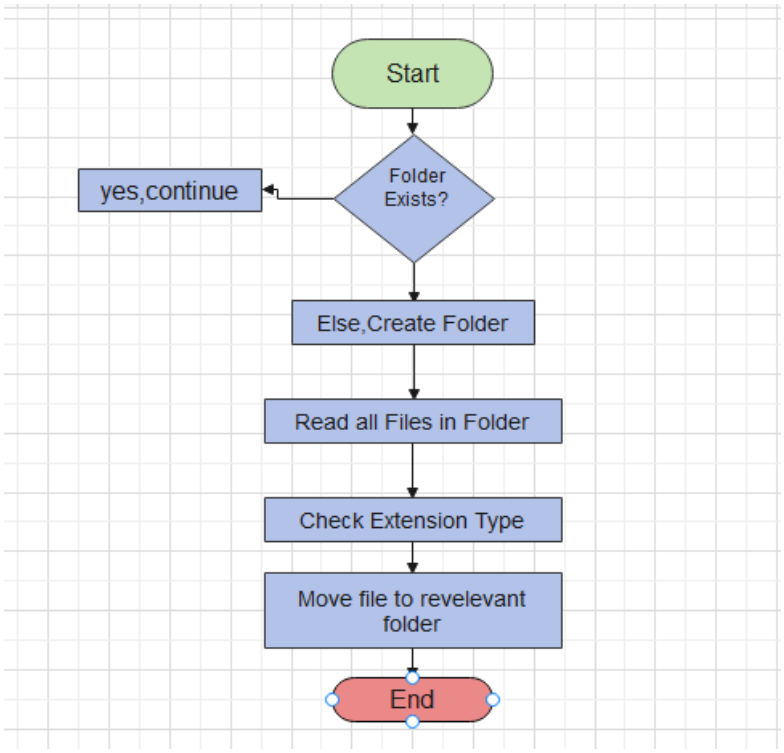
Demonstrating File Automation

Use Case: Creating the folder Structure and Files Segregation

1. Check if particular folder already Exits
2. If yes, continue
3. Else, Create new folder

Moving Attachments/Files(as per extension)

4. For each file in a folder
5. Check file extension type
6. Move file to relevant folder



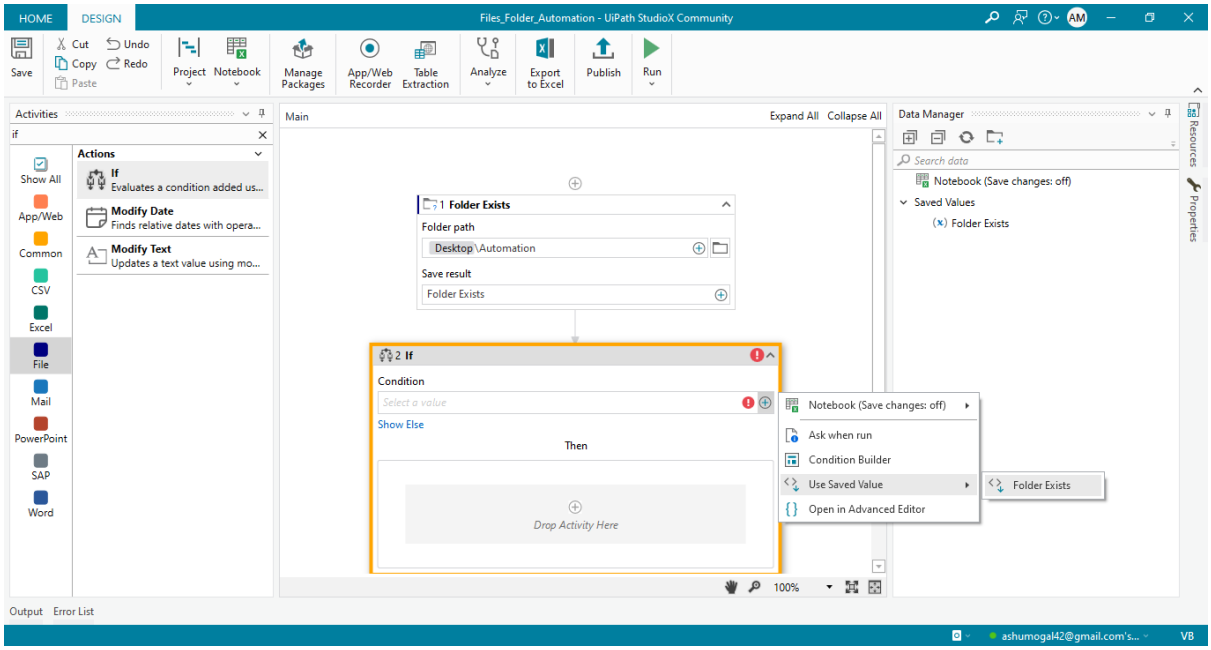
Folder Exists Activity -Checks if the specified folder path exists.

Configuring the Activity:

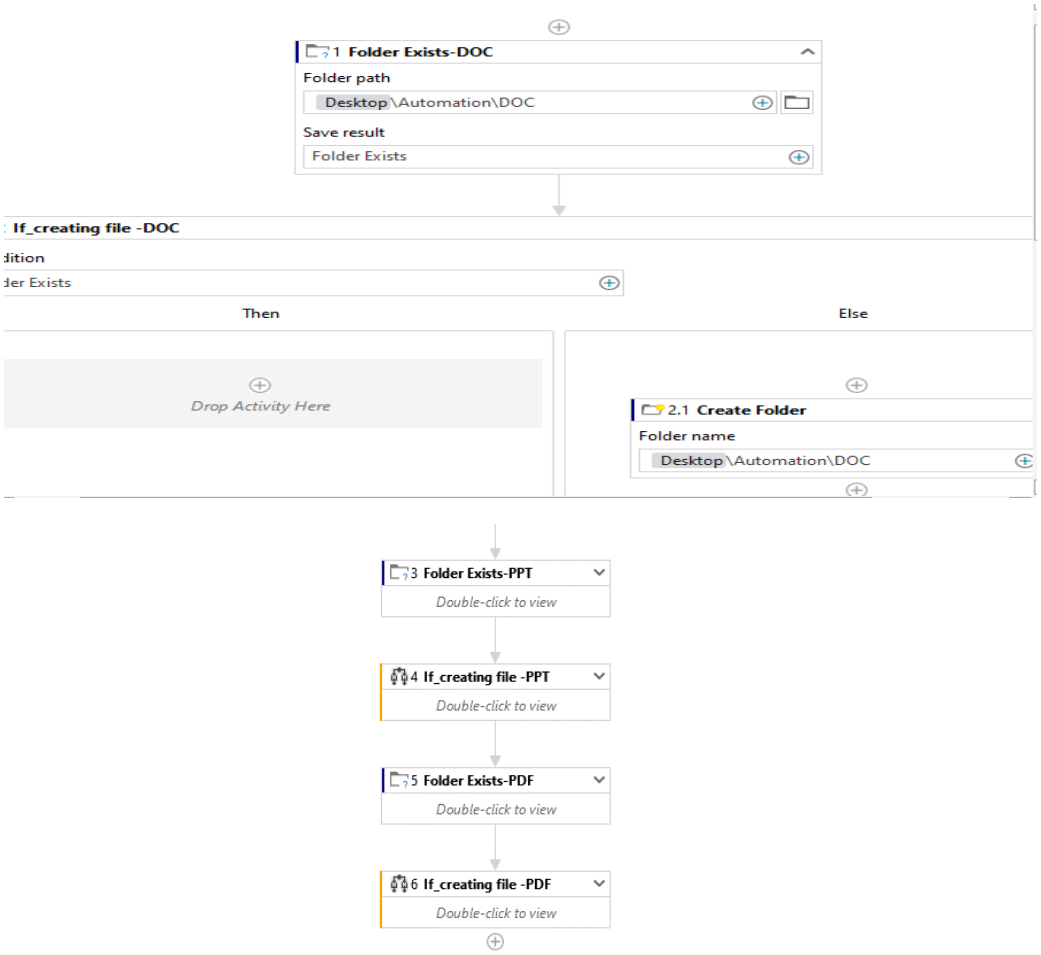
Folder path - Click Browse next to the field and then browse to and select the folder to check.

Save result - Click **Plus** on the right side of the field and then, from the menu, choose one of the available options to indicate where to save the result (TRUE if the folder exists or FALSE if the folder does not exist):

- **Save for Later Use** - Use the output result later in your project as input for another activity.
- **Open in Advanced Editor** - Enter a VB expression.



For checking the folder exist make use of **if activity** in condition specify the folder path which saved in result as (Folder Exists) and in Else section make use of **Create Activity** - Creates the folder on specified path. Likewise you can check your multiple folders exists or not or else creating it.



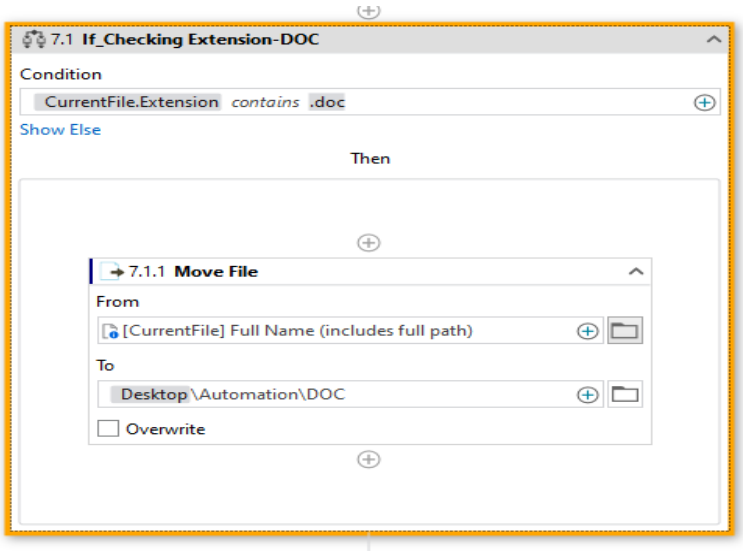
For checking the different file extension in the folder for segregating it in particular folder by making use of **For Each File in Folder Activity** is use when you are working with the files in a folder and you want to repeat one or more activities for each individual file. Add the activities to repeat inside For Each File in Folder and, when you configure the activities, select the file property to use for each file from the CurrentFile entry in the Plus ⊕ menu. For each has the default value is CurrentFile.

If you want to include subfolder files also to be segregated then you have checked the include subfolder check box.

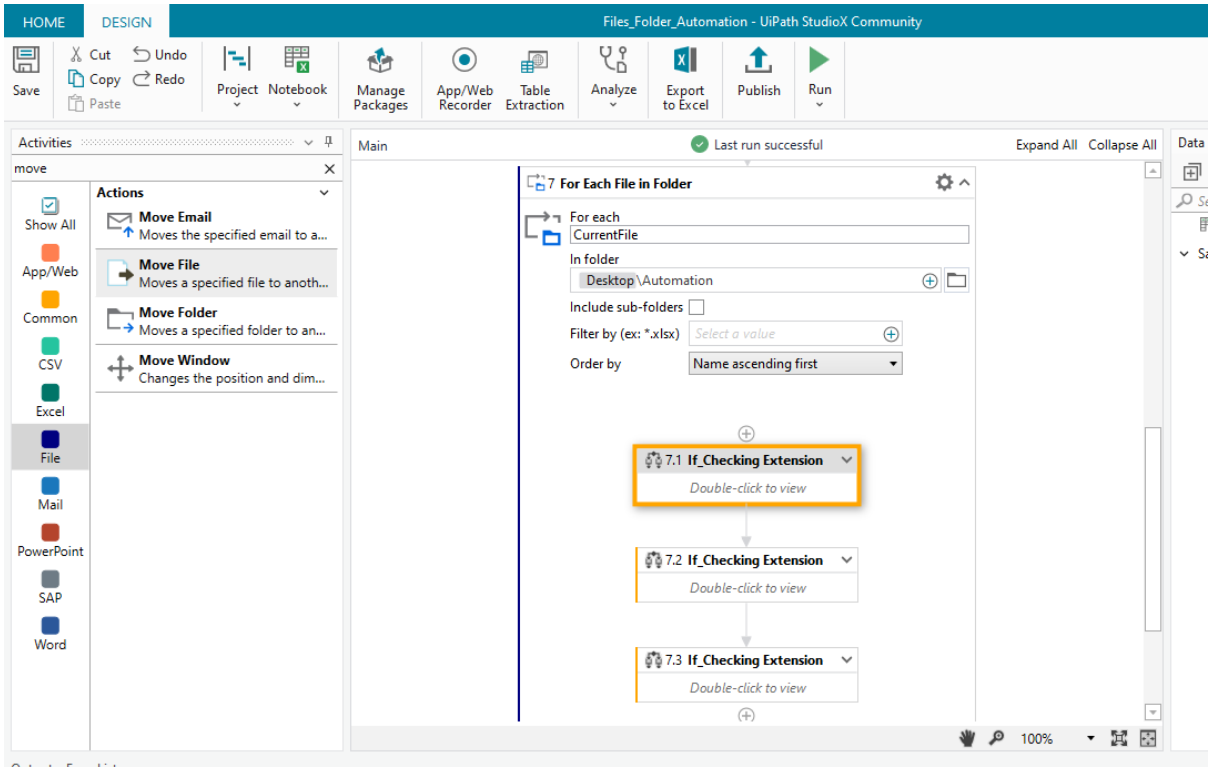
You can also specify the particular extension on which you want to perform the files automation.

Move Activity - Moves a file from a specified folder to another.

In from tab you can browse the source file path or else if you have use the activity is inside a For Each File in Folder activity, you can select CurrentFile > Full Path to indicate the path of the file you are currently iterating through.



Below Screenshot shows how you can check the multiple extension and move the files in particular folder.



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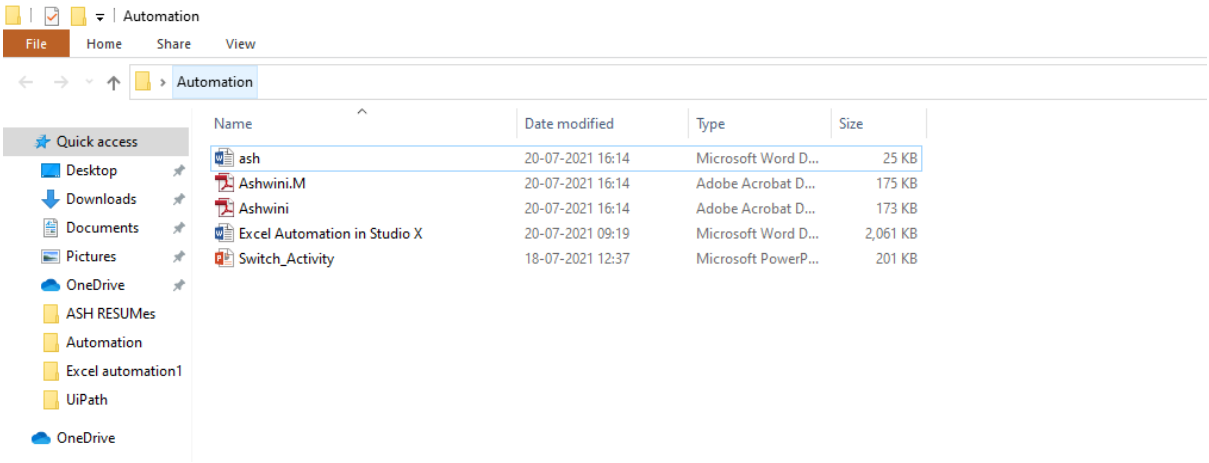
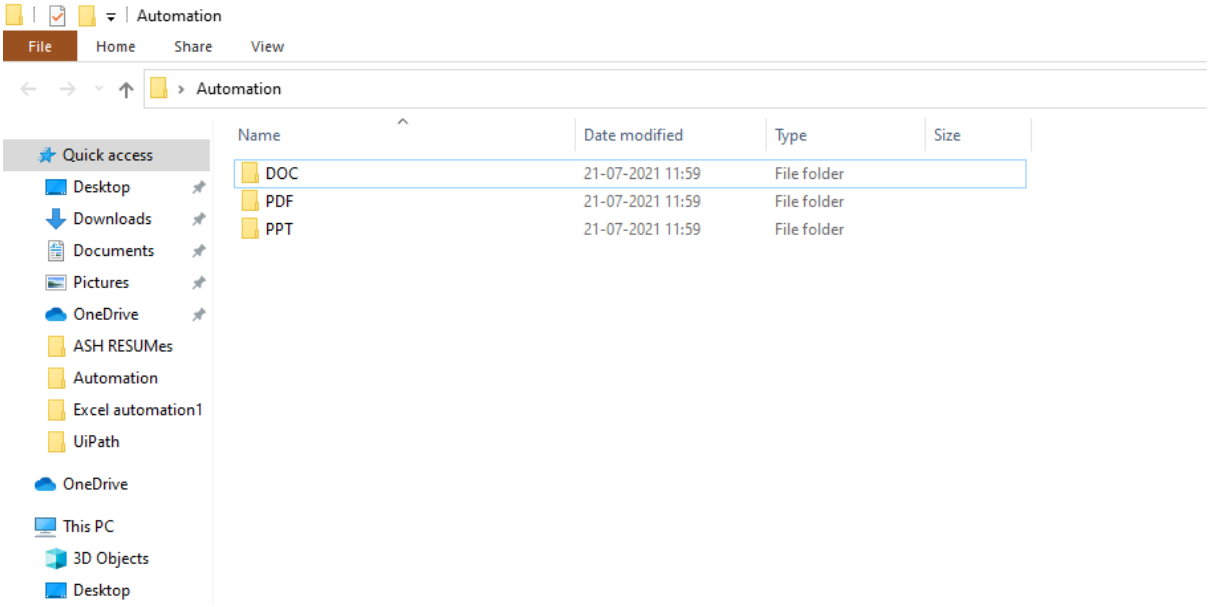
Before Running the bot the File Structure:



After Running the Bot the File Structure:



This task is something which we do daily routine segregating the bulk of files in a particular folders which can be automated using UiPath StudioX feature.