RPA for Automating Invoice Creation Process Using UiPath

Hands-on Lab | Digital Summit 2019

RPA for Automating Invoice Creation Process Using UiPath

Introduction

This document contains a step-by-step process for **generating the invoices from** the Invoicely website and teaches you how to automate the process by using UiPath Studio.

Pre-Requisites

All attendees must have their workstation (with Internet) to participate in the lab the following pre-requisites will help you to make the Hands-on Lab experience easier.

- Active email ID for registering with Invoicely Website and UiPath Platform

Technology Involved

- Uipath Studio

Lab Steps

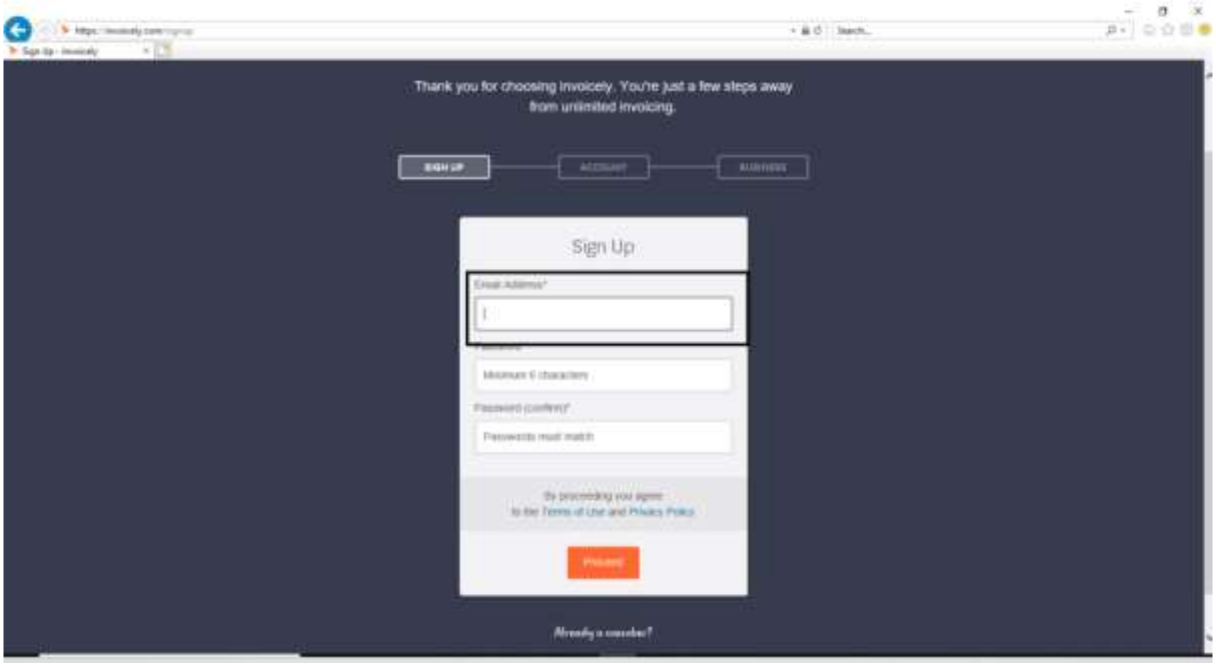
Let us get started with the lab!

The following steps will outline how you can create and run a bot in UiPath Studio. This application helps in the creation of invoices automatically by fetching the data that is present in the Excel Sheet.

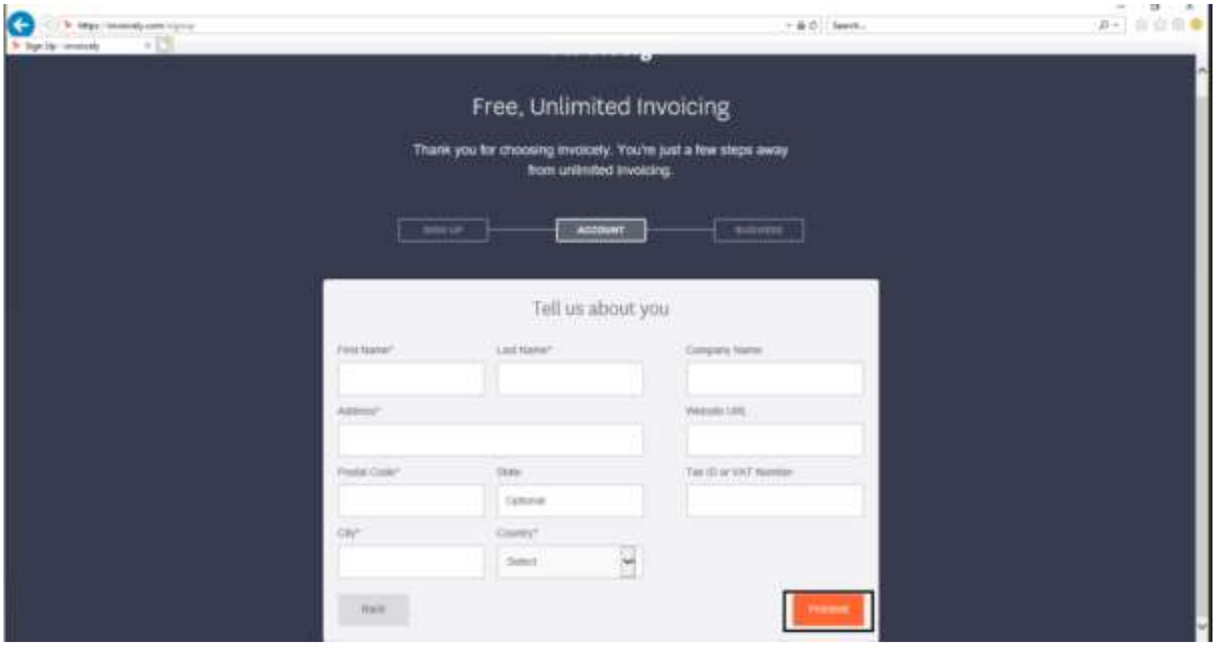
Step #1 | Register for Invoicely website

Open the link https://invoicely.com and click on **Sign up free.**

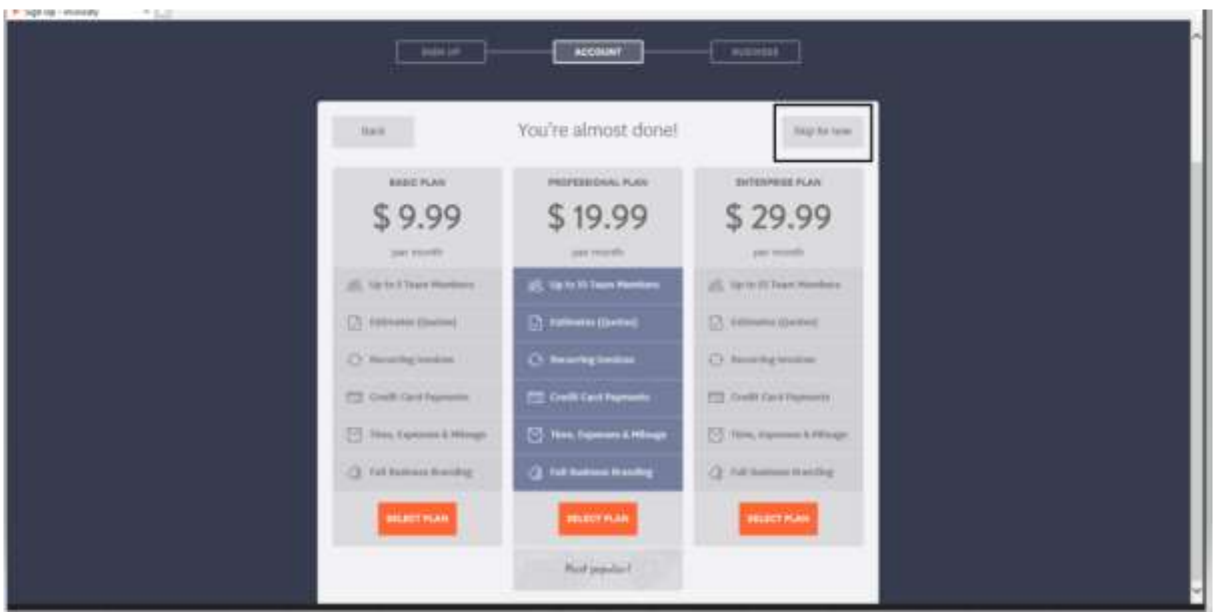
Enter your valid email credentials and click on **Proceed.**



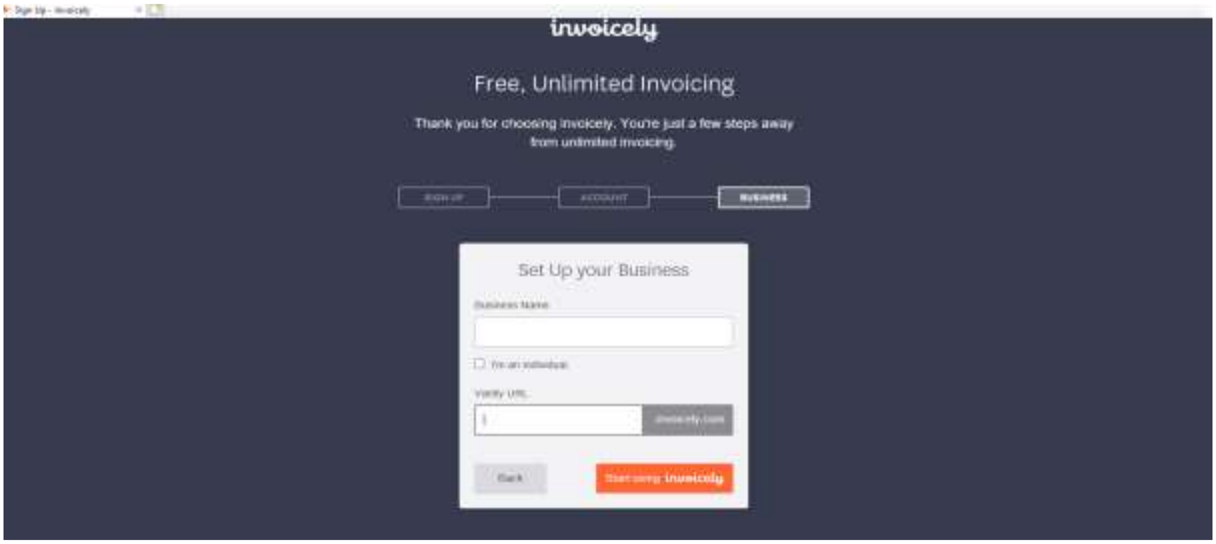
Enter your personal information and Click on **Proceed.**



A list of available plans will be shown on screen. Click on **Skip for now.**



Set up your Business name and click on **Start your Invoicely**.



Finally, close the **Website portal.**

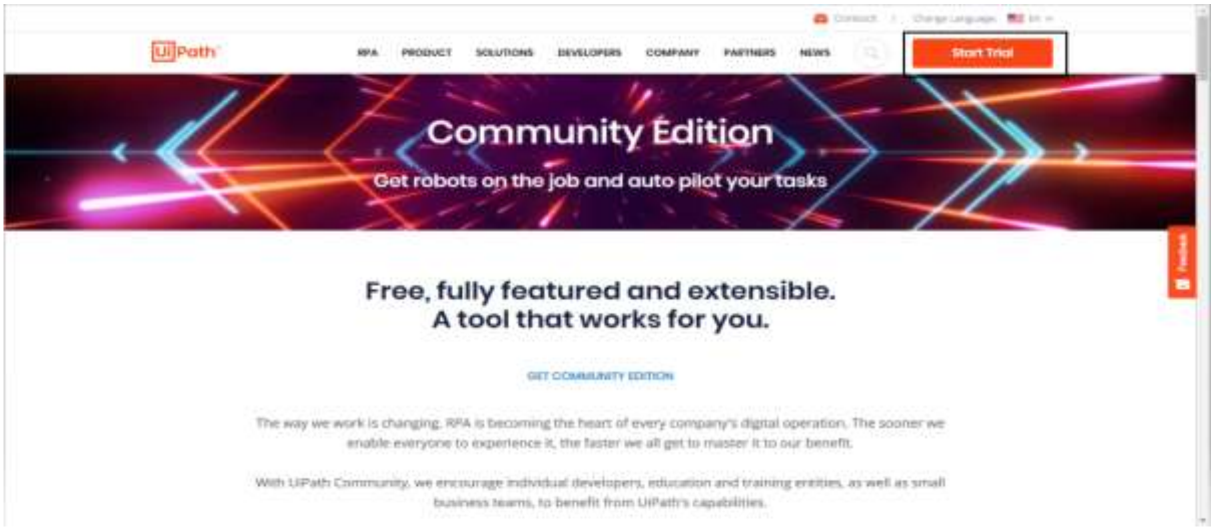
Step #2 | Install UiPath Studio

You will have to follow the steps given below to install UiPath Studio on your local system.

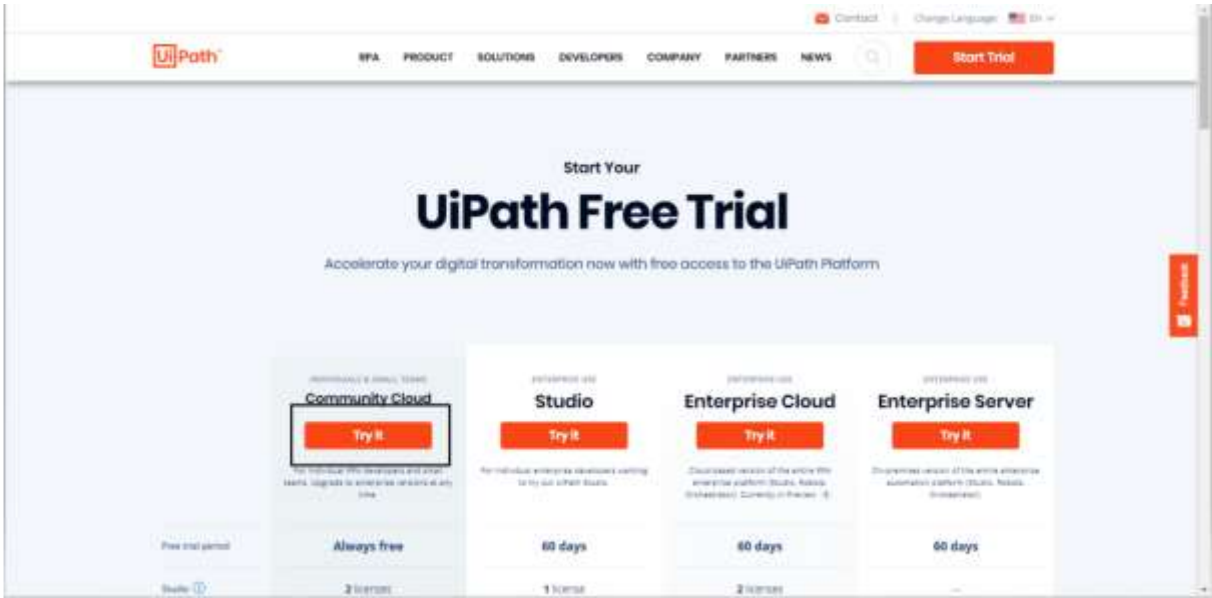
Step1: First to download UiPath Studio, please open the link in browser

https://www.uipath.com/developers/community-edition

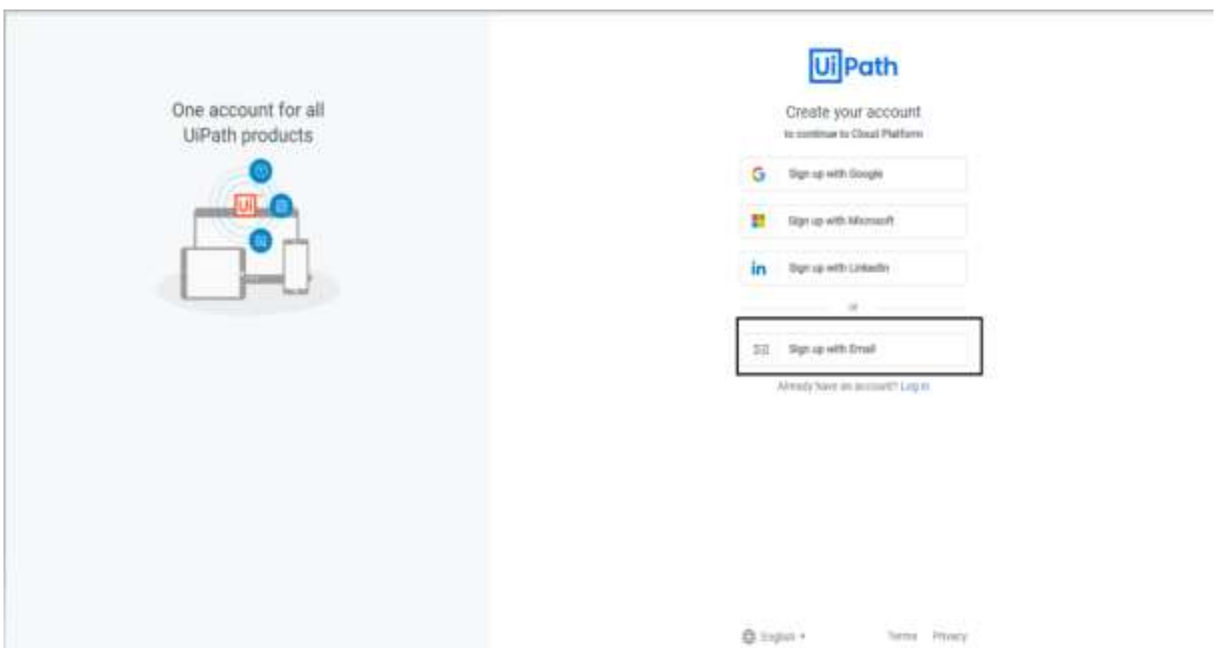
Click on **Start Trial.**



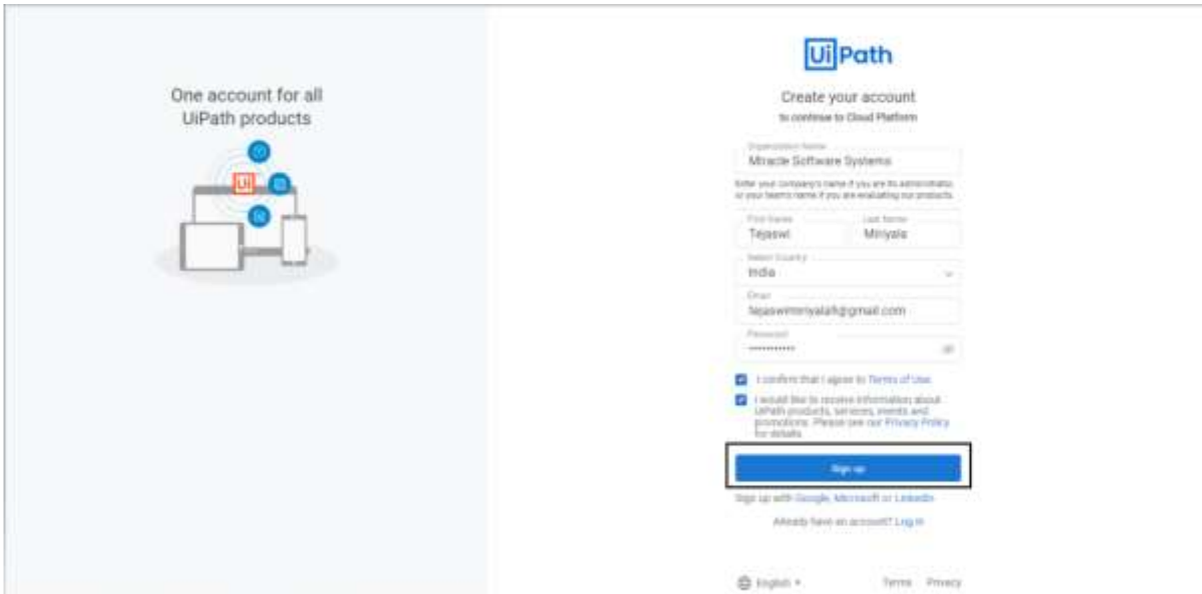
Now, click on **Community Cloud->Try it** button.



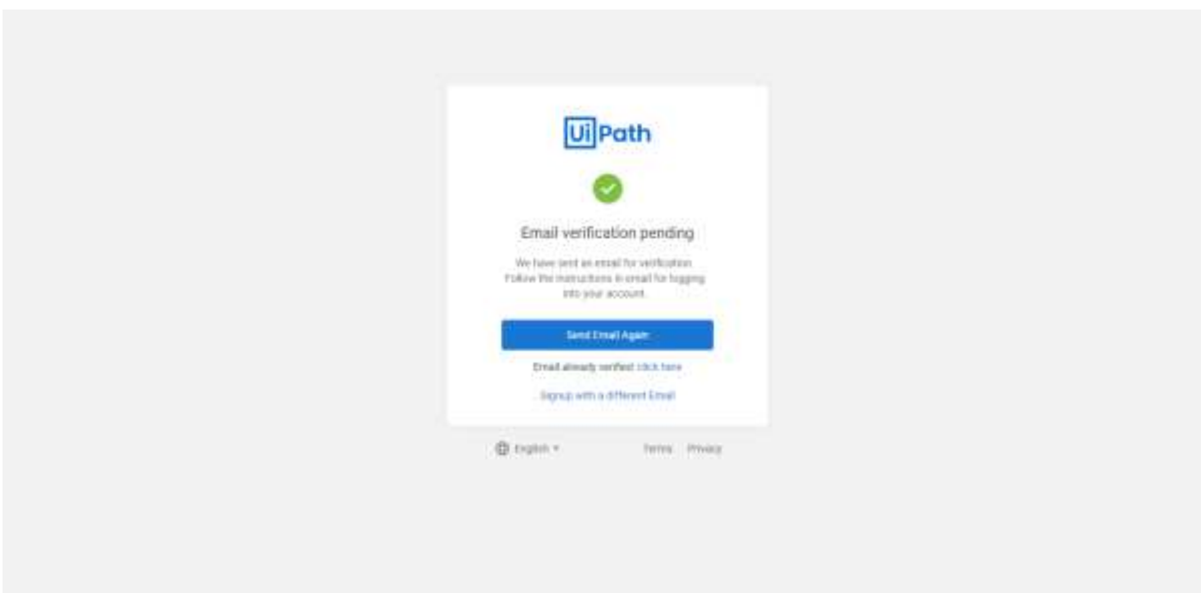
Create your own account by clicking on **Sign up with Email**.



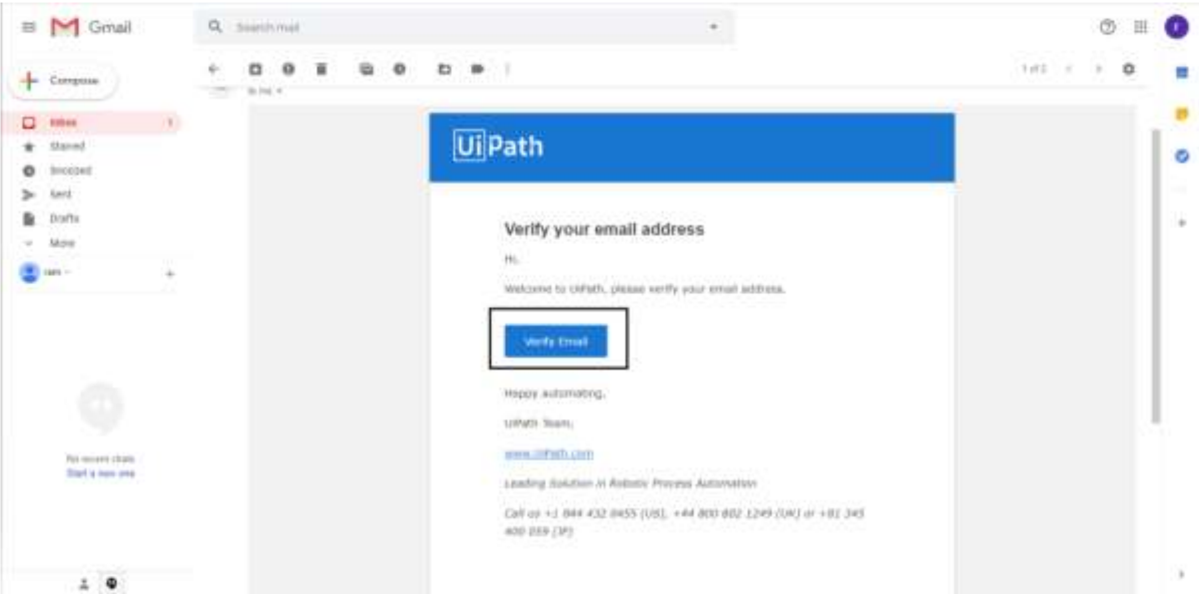
Enter your valid credentials in the form and click on **Sign up.**



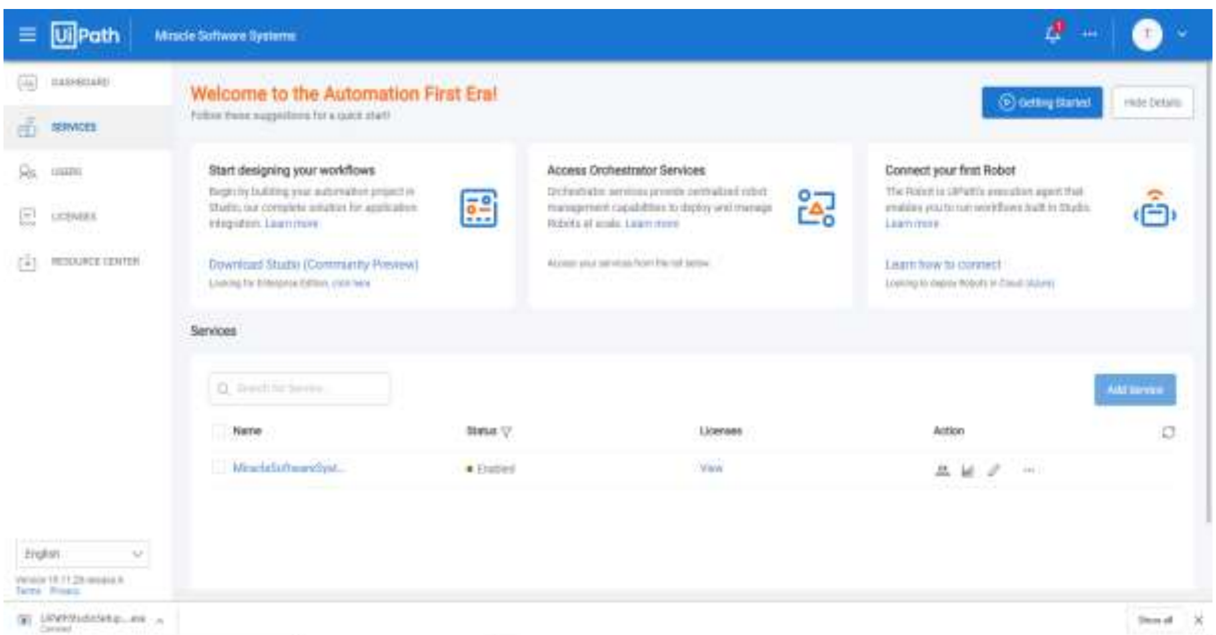
It will navigate to this page.



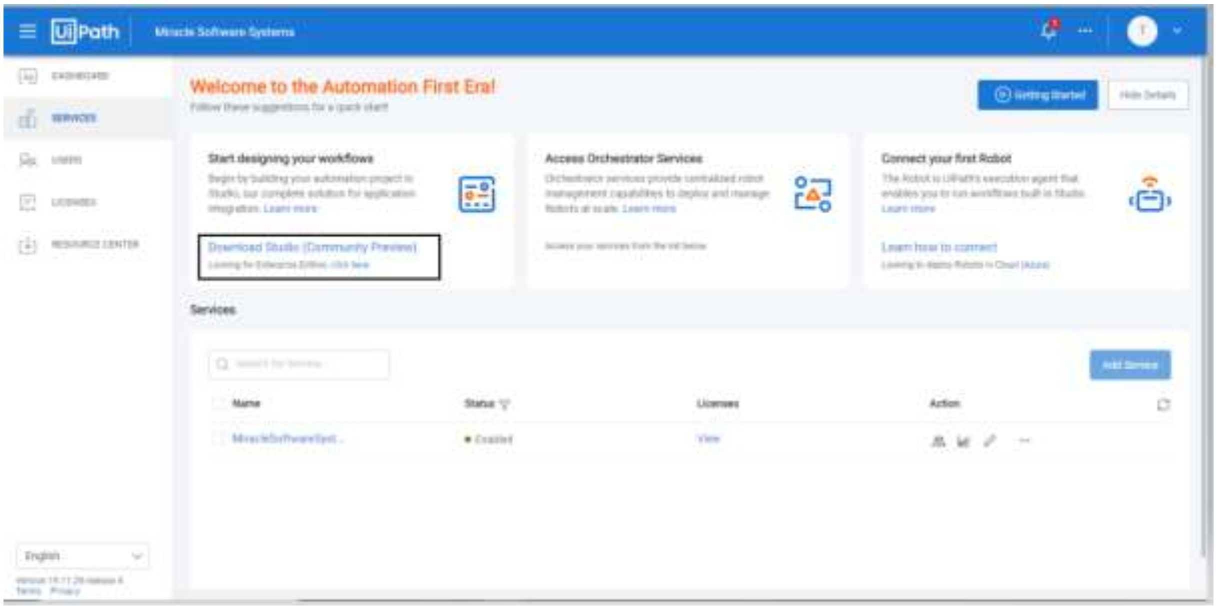
You will get a Verification link in your email id. Click that for Verification purpose.



After verification in email, it will directly navigate to this page.



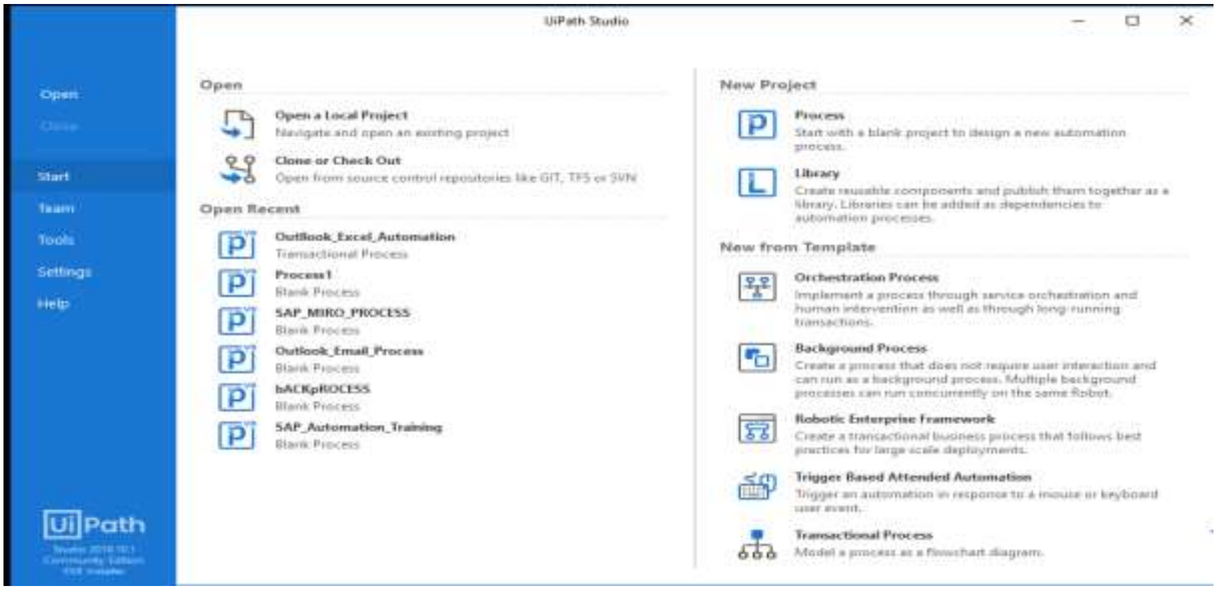
Click on the **Download Studio.** It will download an exe file on your computer.



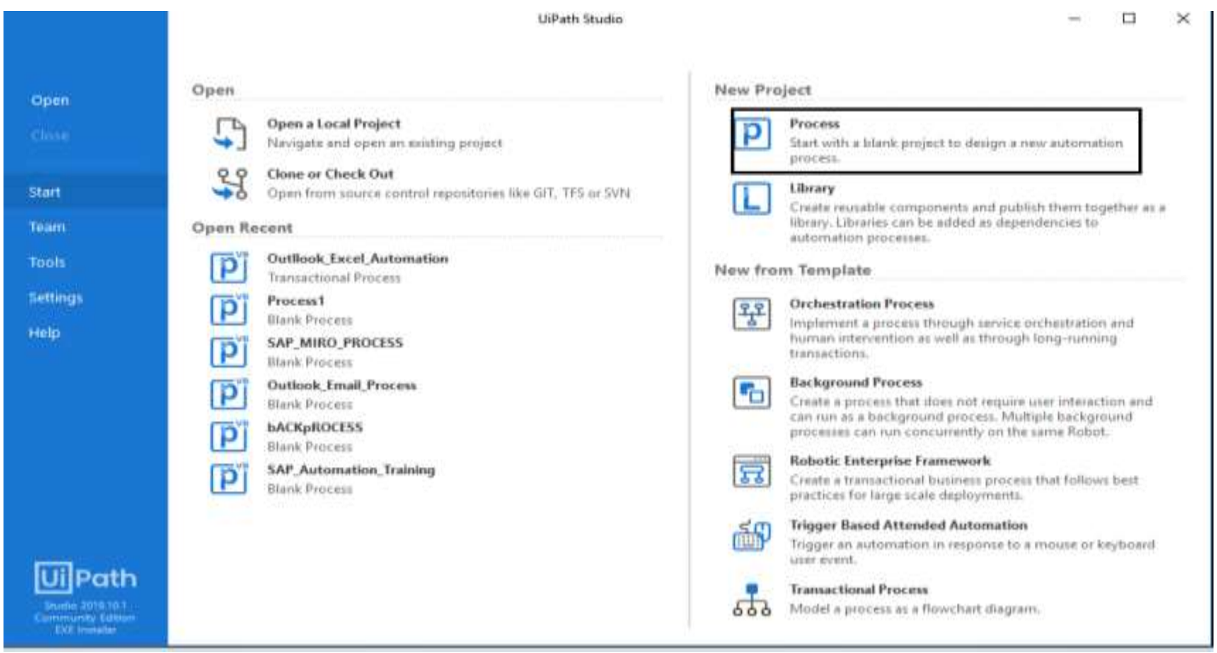
In order to install, run the exe file named **UiPathStudio.exe** that was downloaded earlier. UiPath will start its installation on your computer.

Step #3 | Creating New Process in UiPath Studio

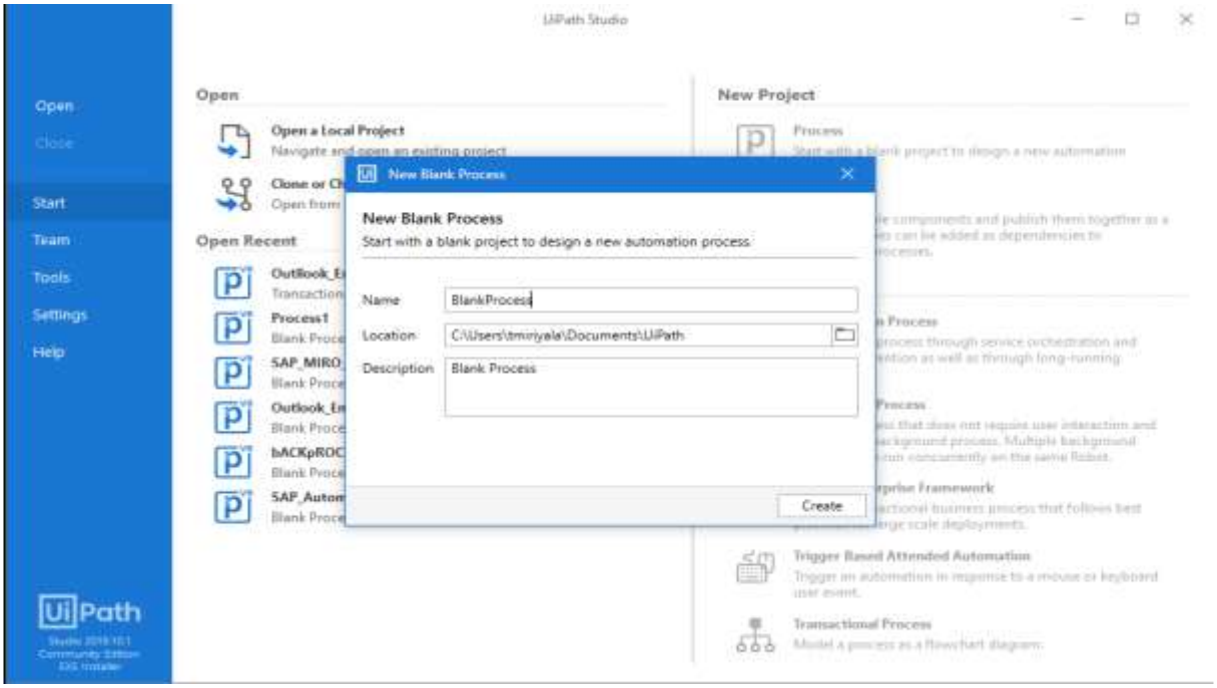
Once the installation steps are completed, we can see the following screen.

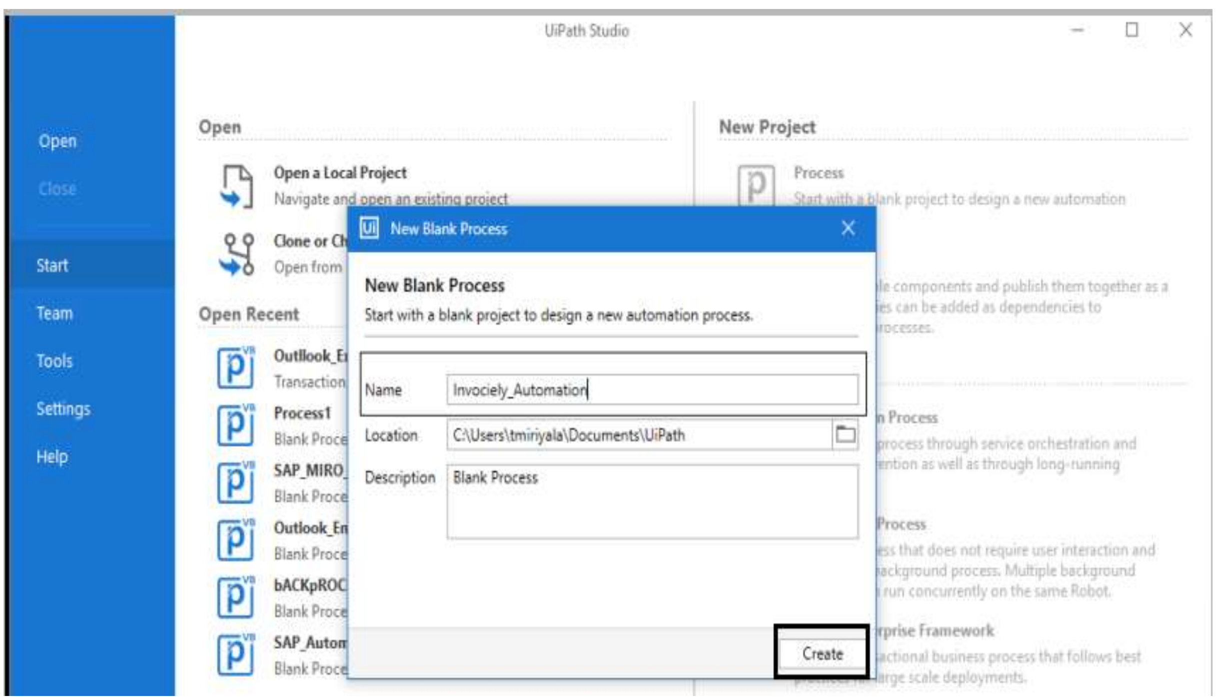


Click on **Process.**



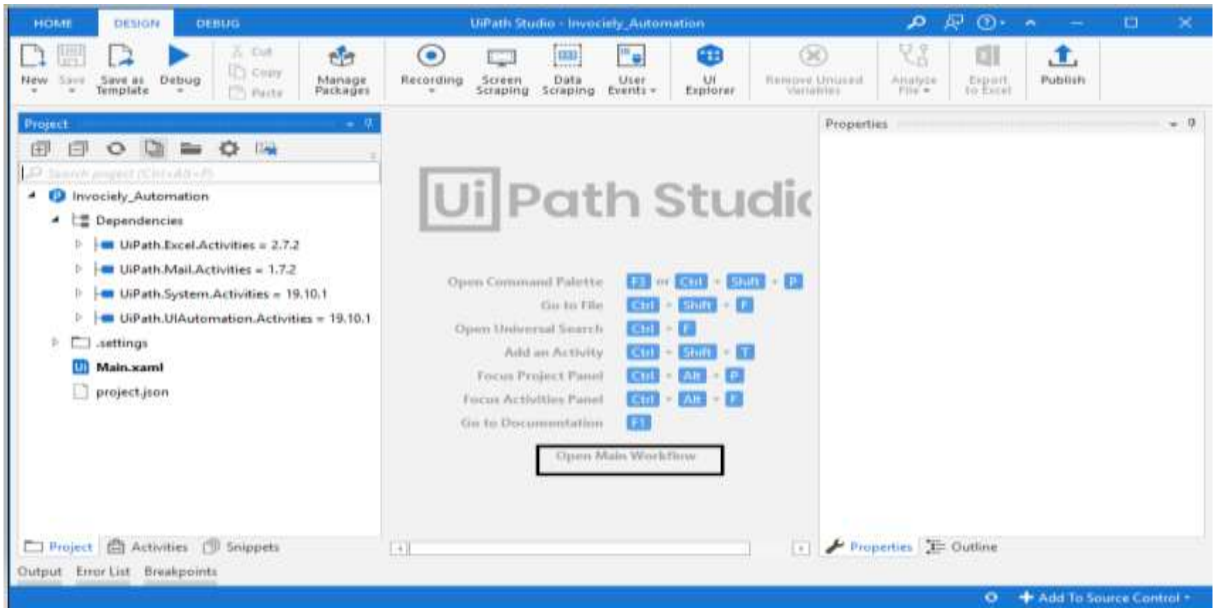
Create a **New Process** by specifying the **Name** and Description. Click on **Create.**



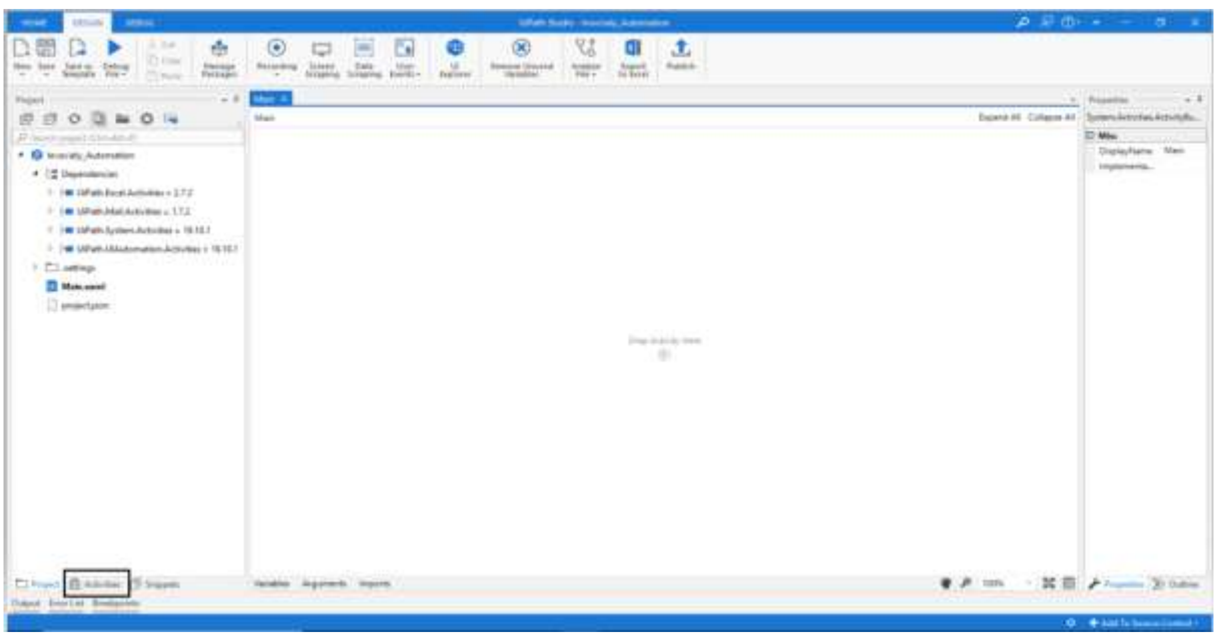


Step #4 | Constructing a Workflow

Click on **Open Main Workflow.**

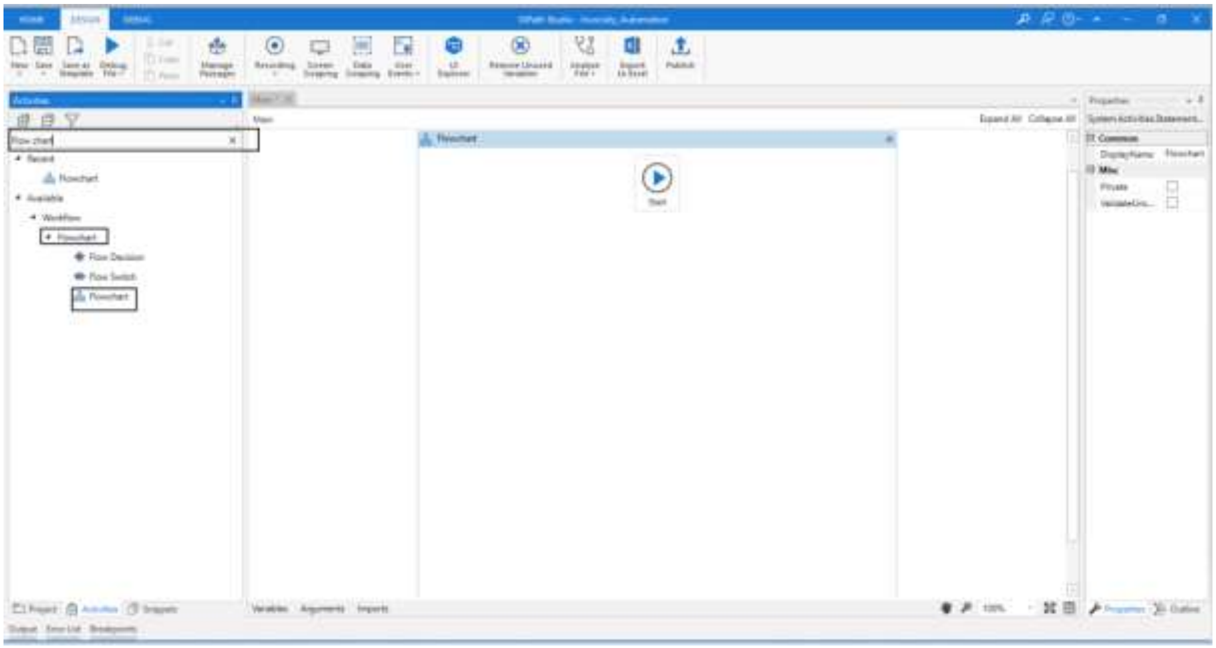


Click on **Activities.**

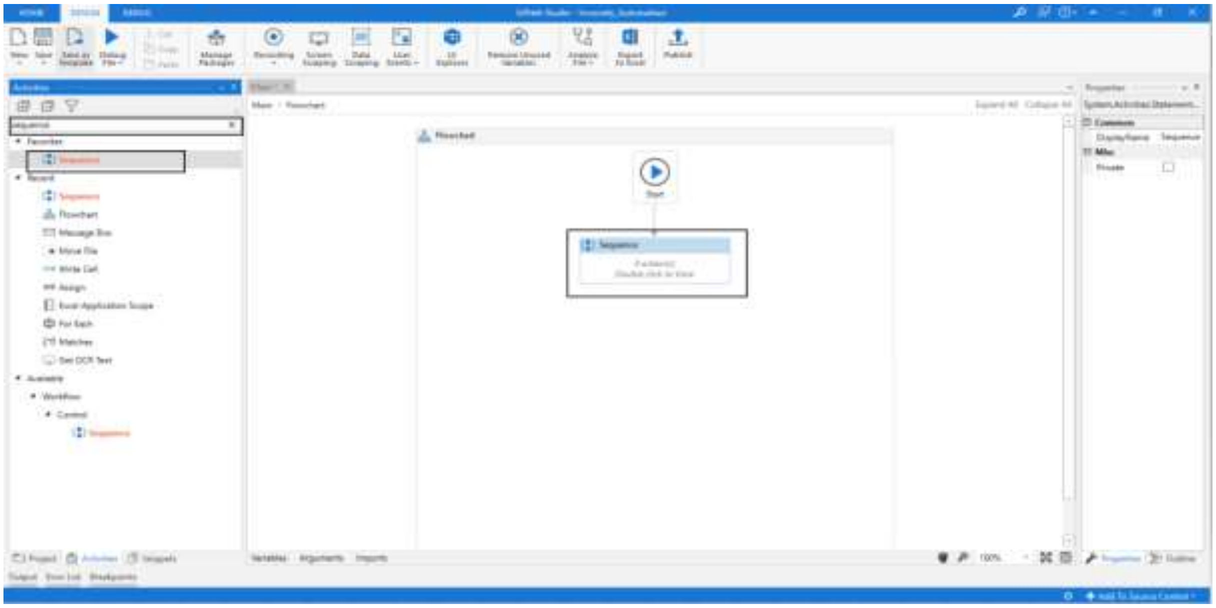


In the **Activities panel,** we can search for different activities based on our need and every activity is accessed by drag and drop operation.

Drag and Drop **Flowchart** in the editor.

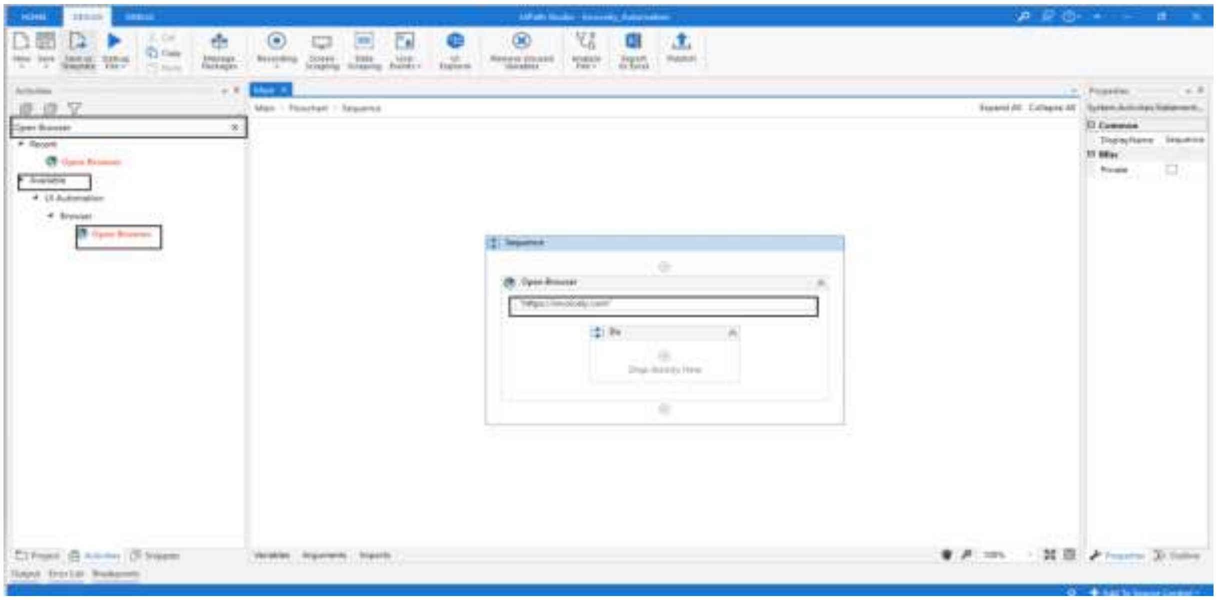


Drag and Drop **Sequence** in the editor.

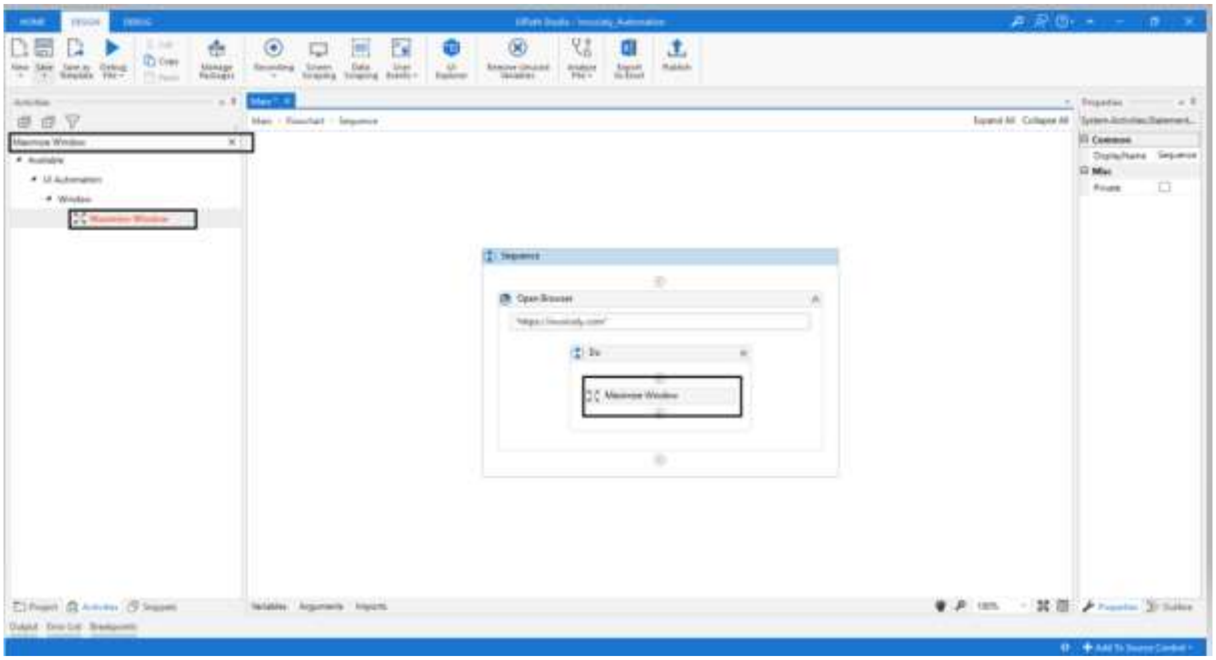


Double click the **Sequence,** in that drag and drop an activity called **Open Browser** and provide the website URL that we want to navigate to.

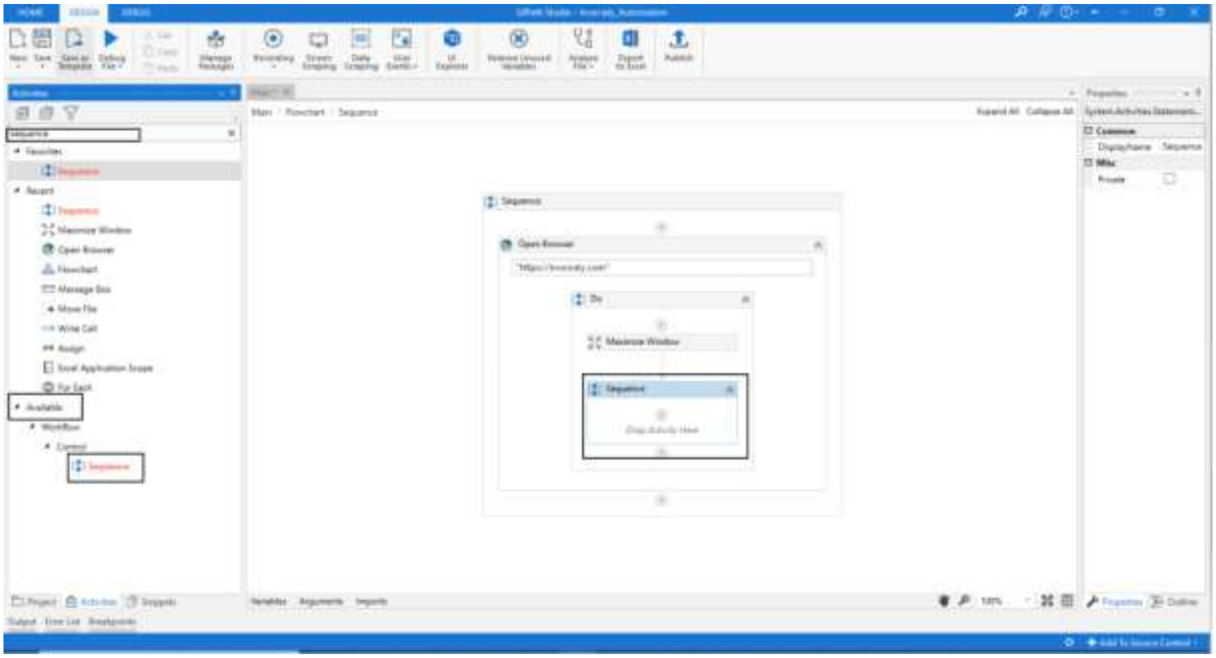
URL: https://invoicely.com



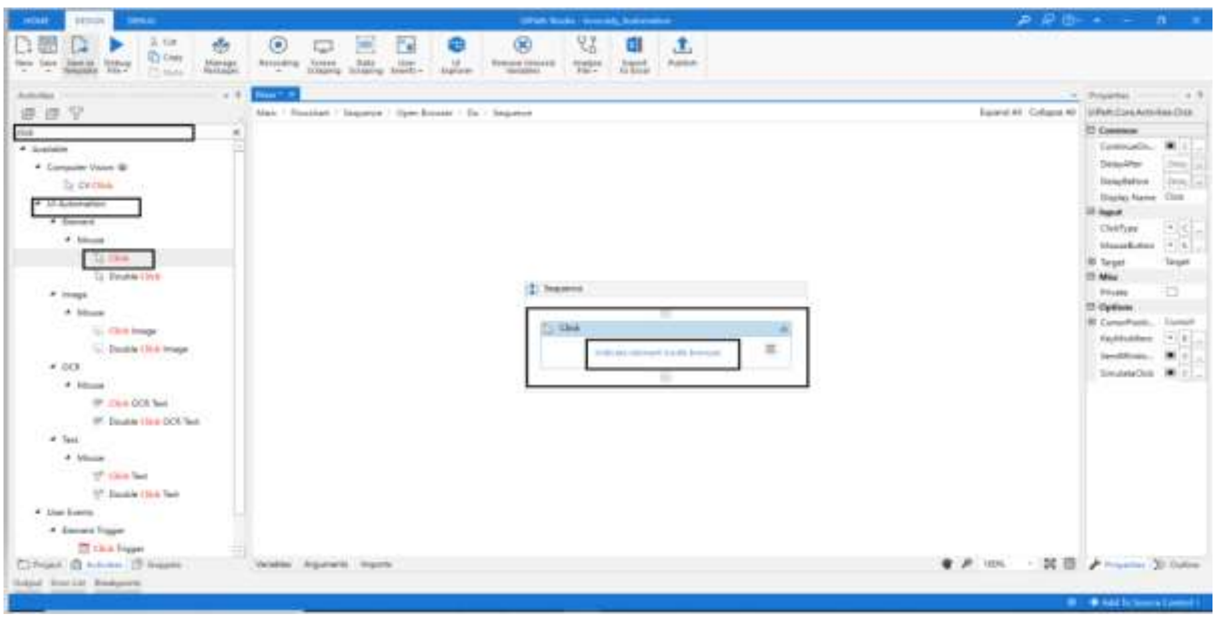
Drag and Drop **Maximize Window** inside the **Open Browser**->**Do Block.**



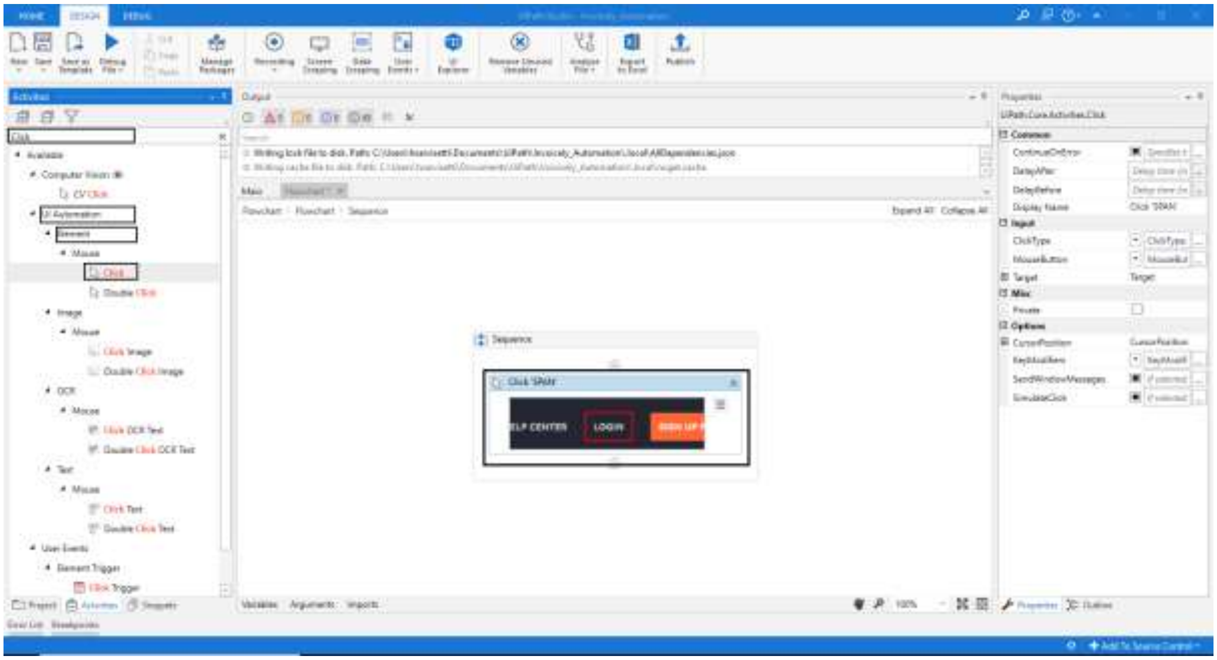
Again, drag and drop a **Sequence** inside the **Do Block** of **Open Browser.**



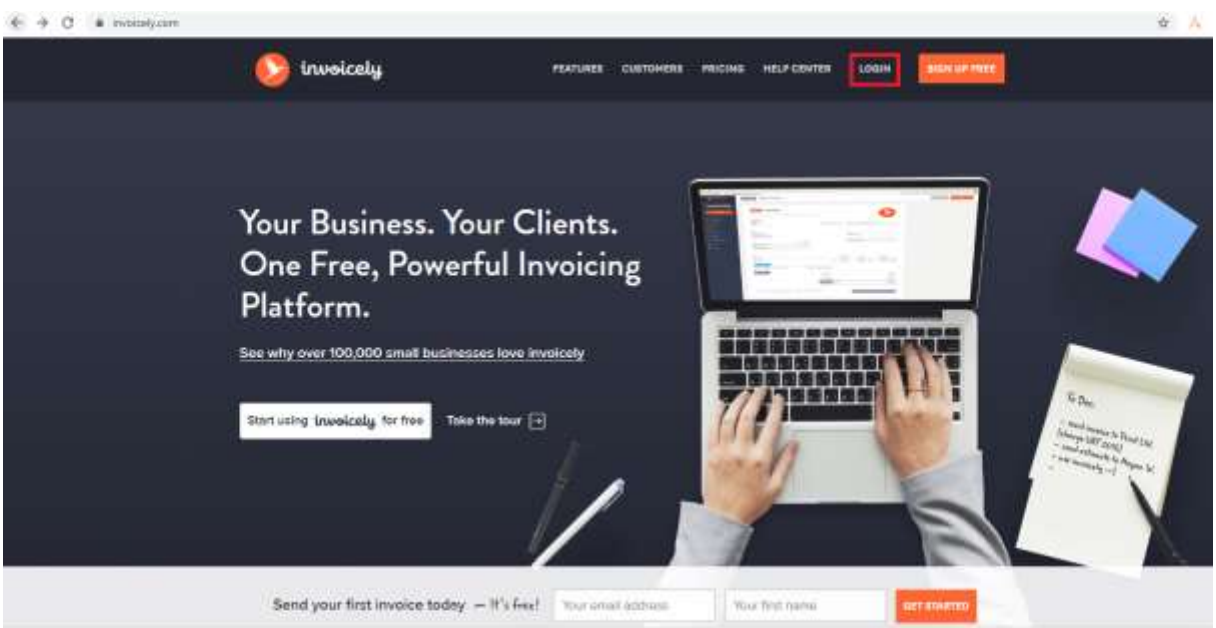
Inside the **Sequence,** drag and drop a UI Automation activity i.e., **Click Activity.**



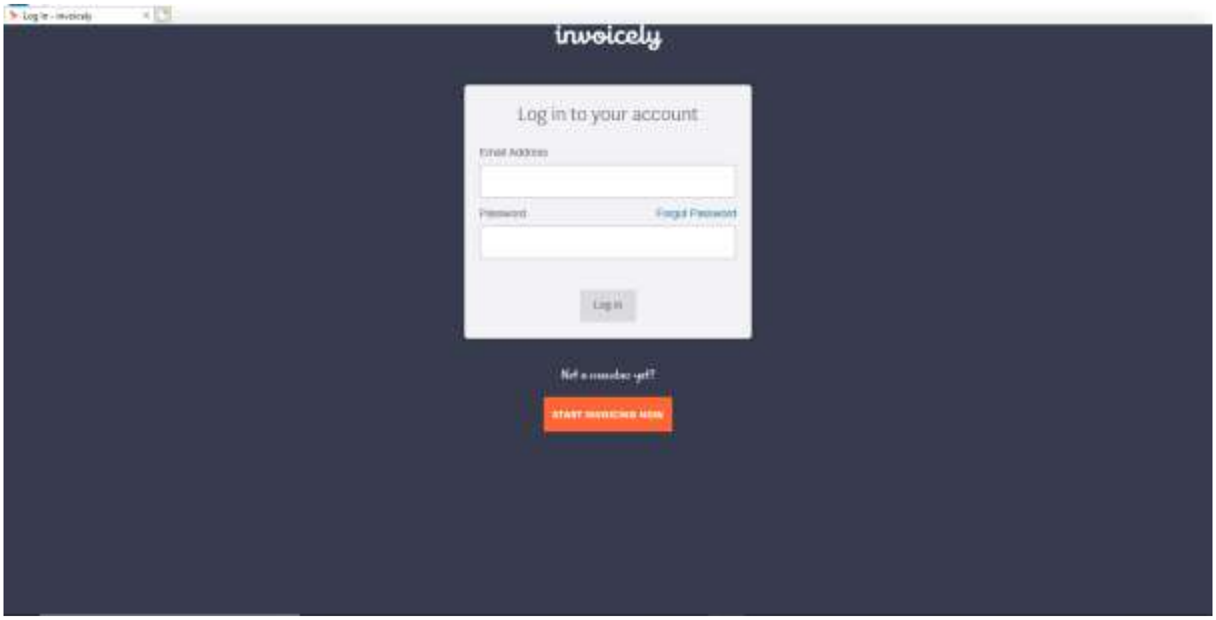
Indicate the **Login** on the Website.



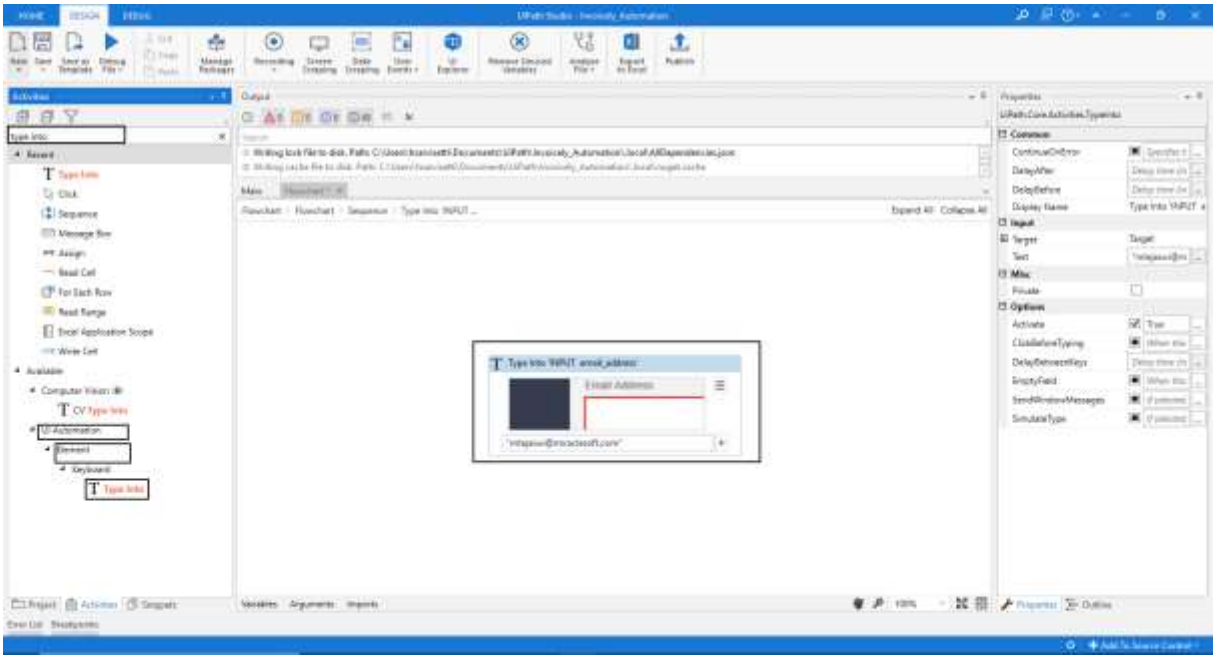
When we run it will show the below screen,



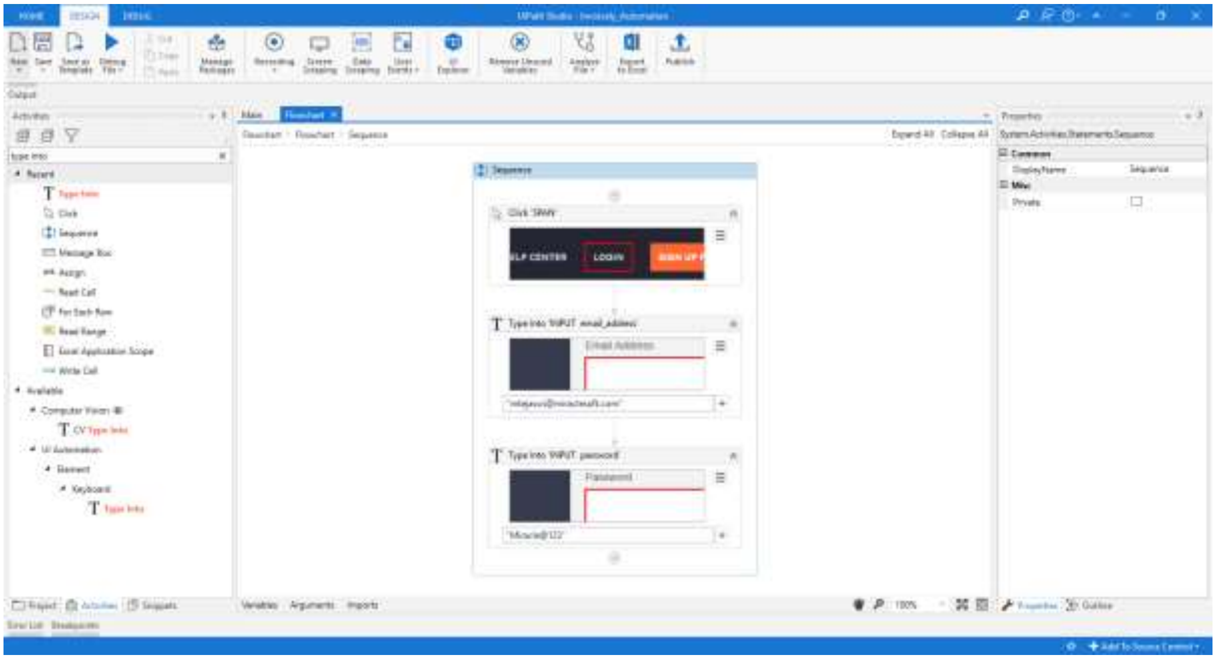
When Login is clicked it will show this screen.



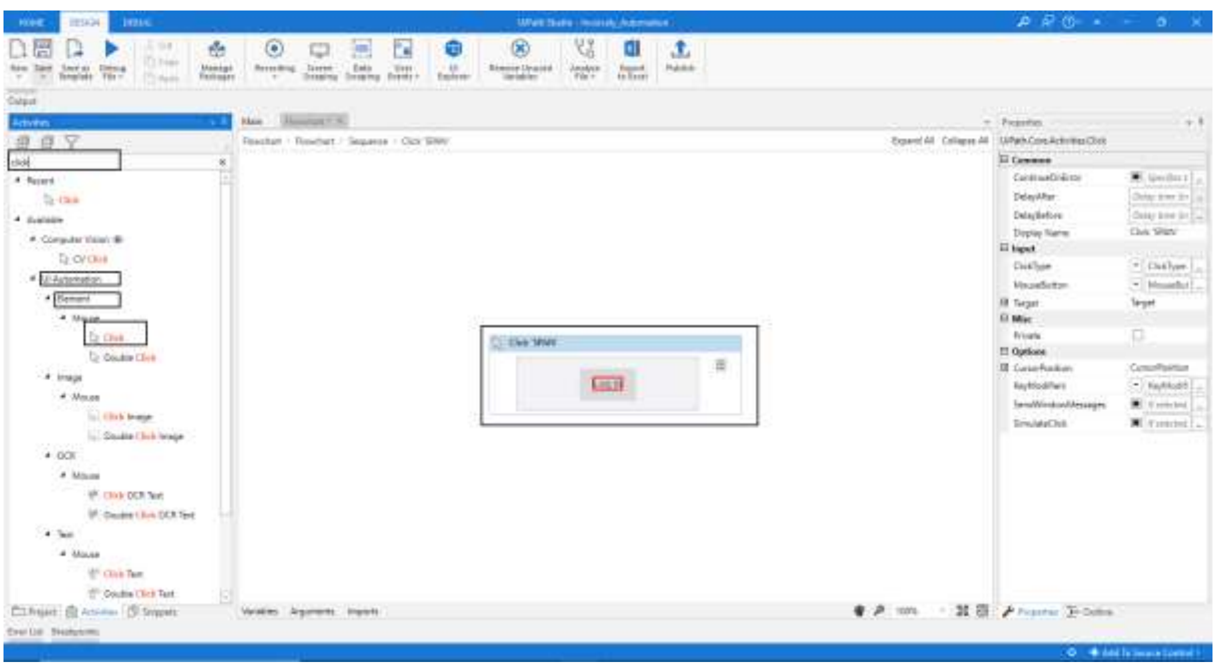
Drag and drop **TypeInto Activity** inside the **Sequence.**



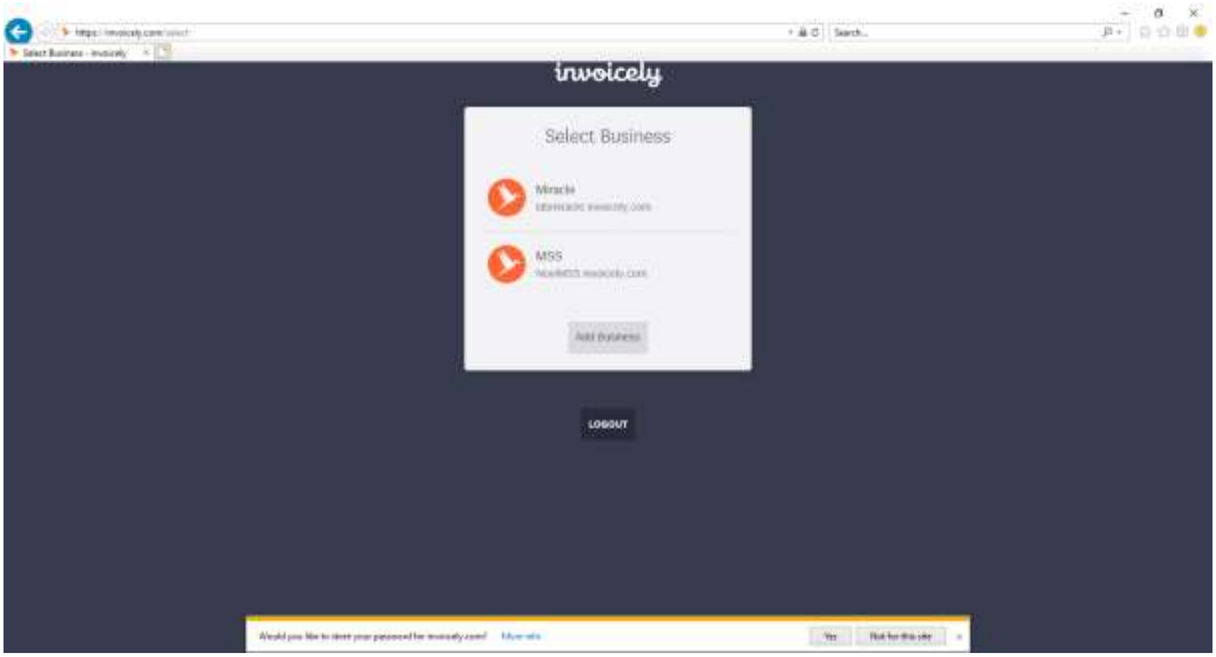
Undergo the same process to fill other Text Box using **TypeInto Activity**.



Drag and drop **Click Activity** inside the **Sequence.**

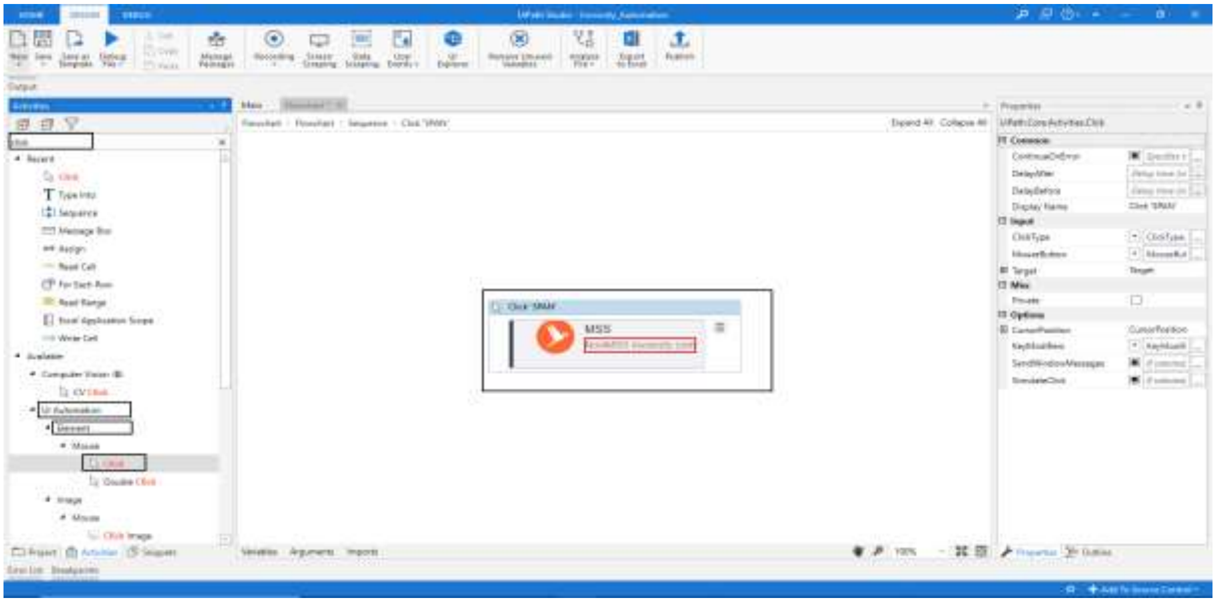


When we run the above steps it will show us the below screen,

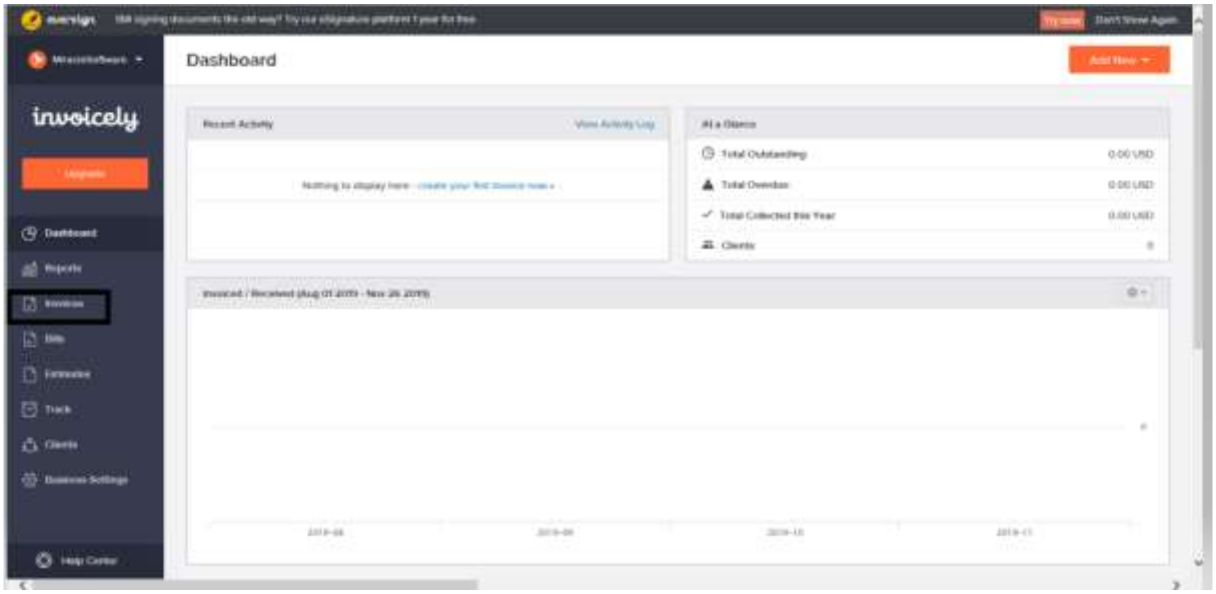


Now, indicate any Business that we created during the time of registration in **Invoicely.com.**

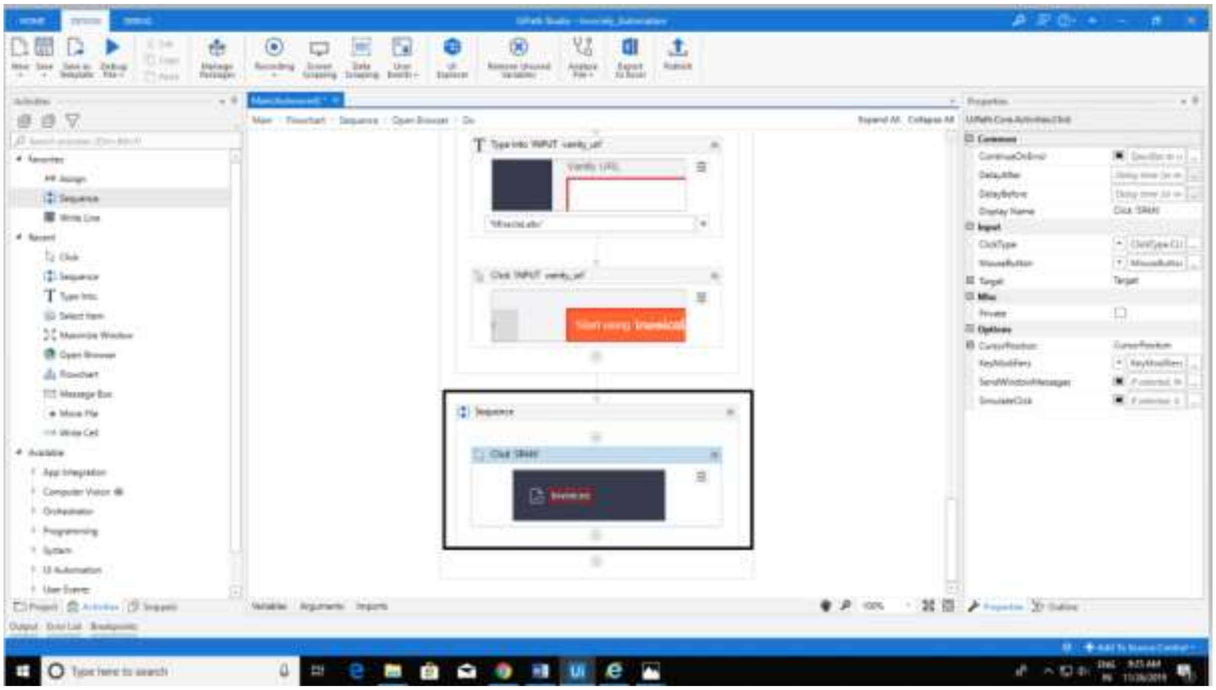
Drag and drop the **Click Activity** inside the **Sequence.**

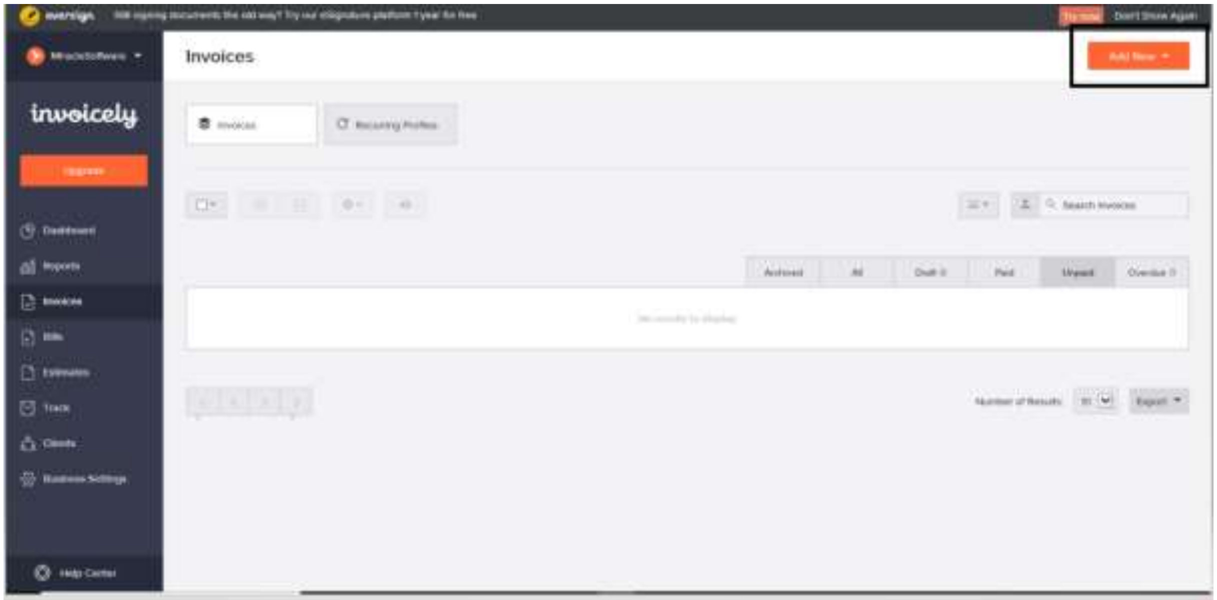


When we run the above process it will come to this screen.

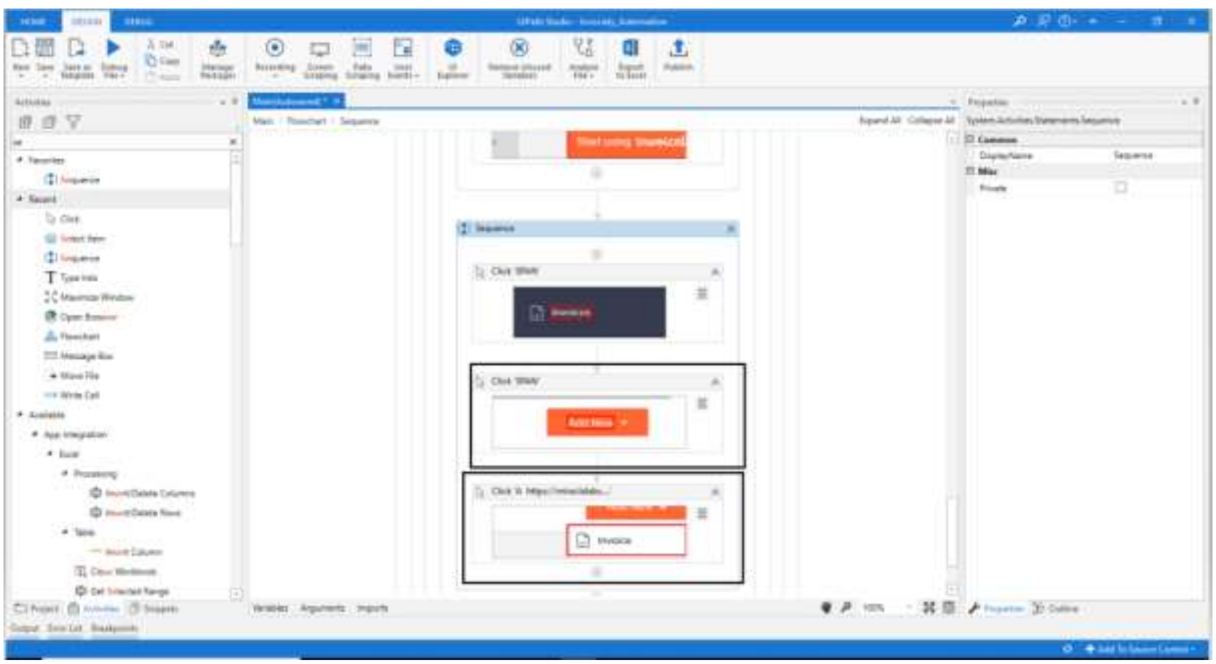


Now drag and drop the click activity and indicate the screen into the **Invoice.**

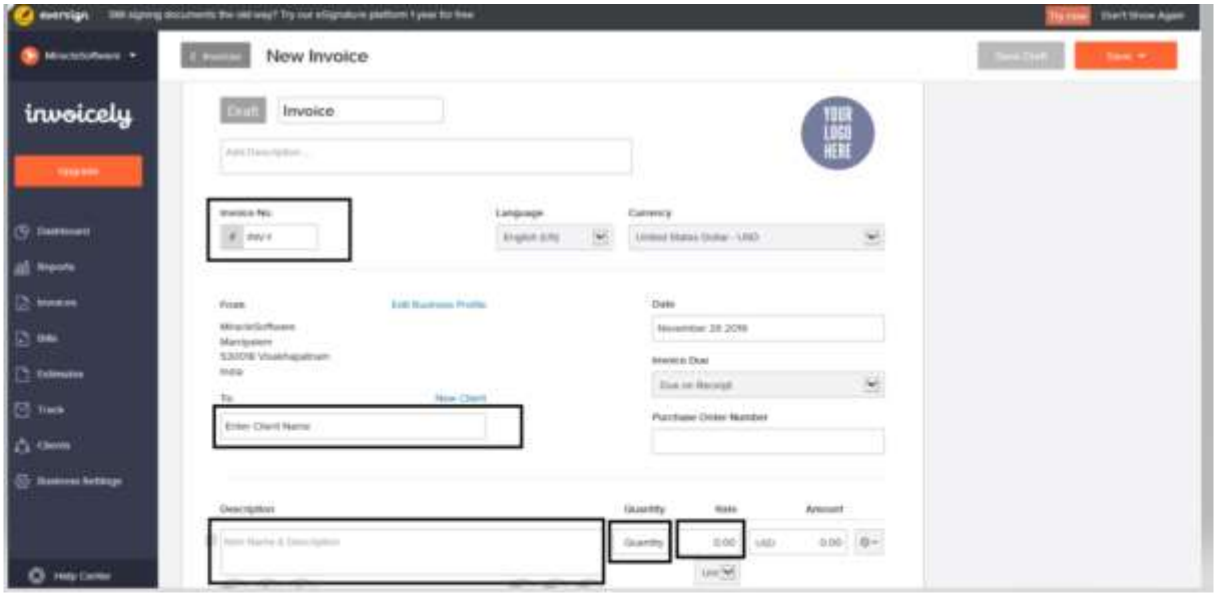




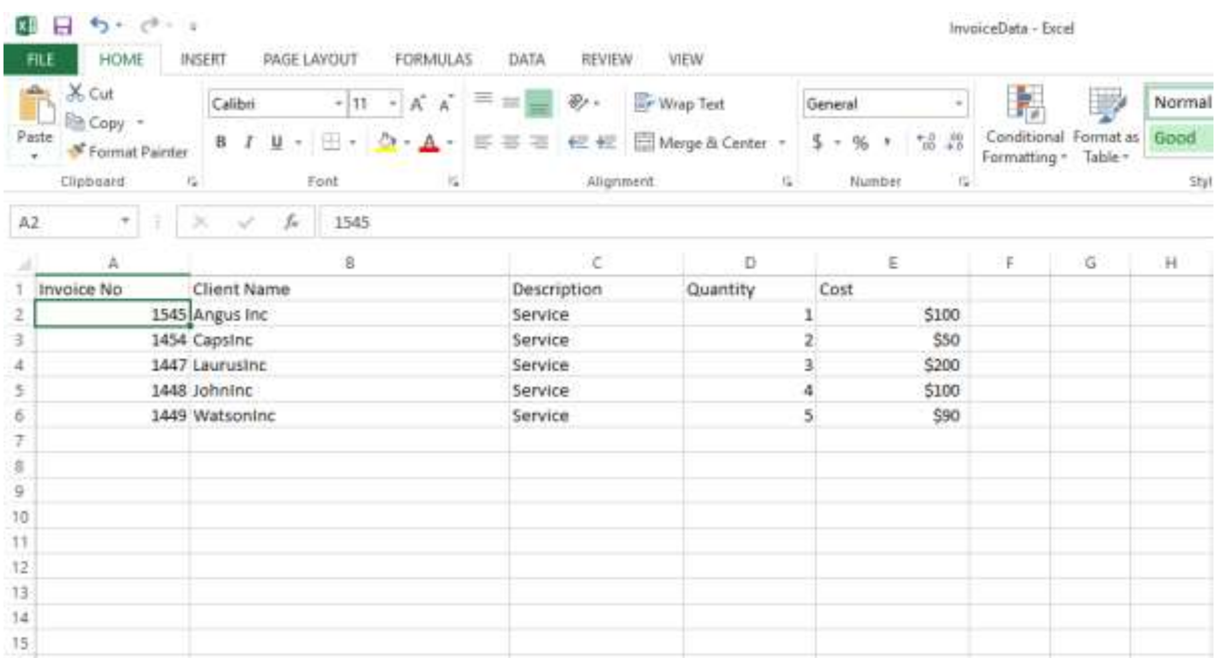
Drag and drop the click activity Indicate **Add new -> Invoice.**



When we run, it will navigate to this page after clicking Invoice in Add New.

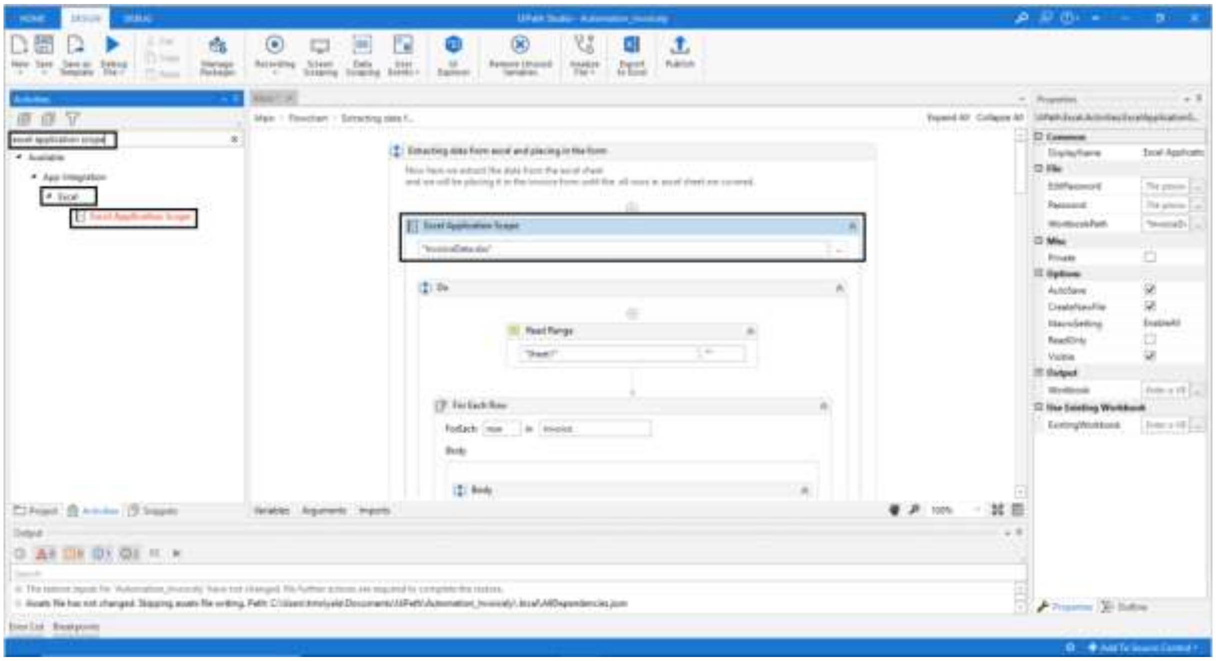


This is the Excel sheet where information about the Invoice details are sent. Now we will fetch this data row by row and place them in the template in the website.

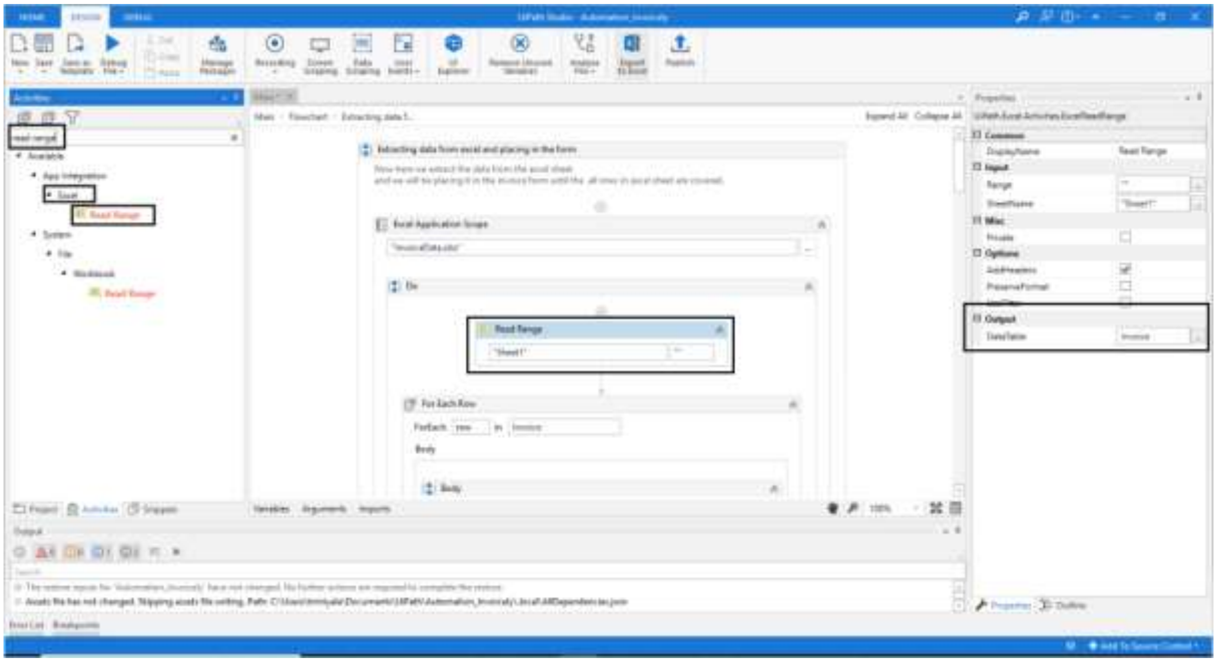


Invoice No	Client Name	Description	Quantity	Cost
1545	Angus Inc	Service	1	$100
1454	CapsInc	Service	2	$50
1447	LaurusInc	Service	3	$200
1448	JohnInc	Service	4	$100
1449	WatsonInc	Service	5	$90

If we want to work with the Excel file we need to use the activities inside the Excel Application scope. Now, Drag and Drop **Excel Application Scope.**

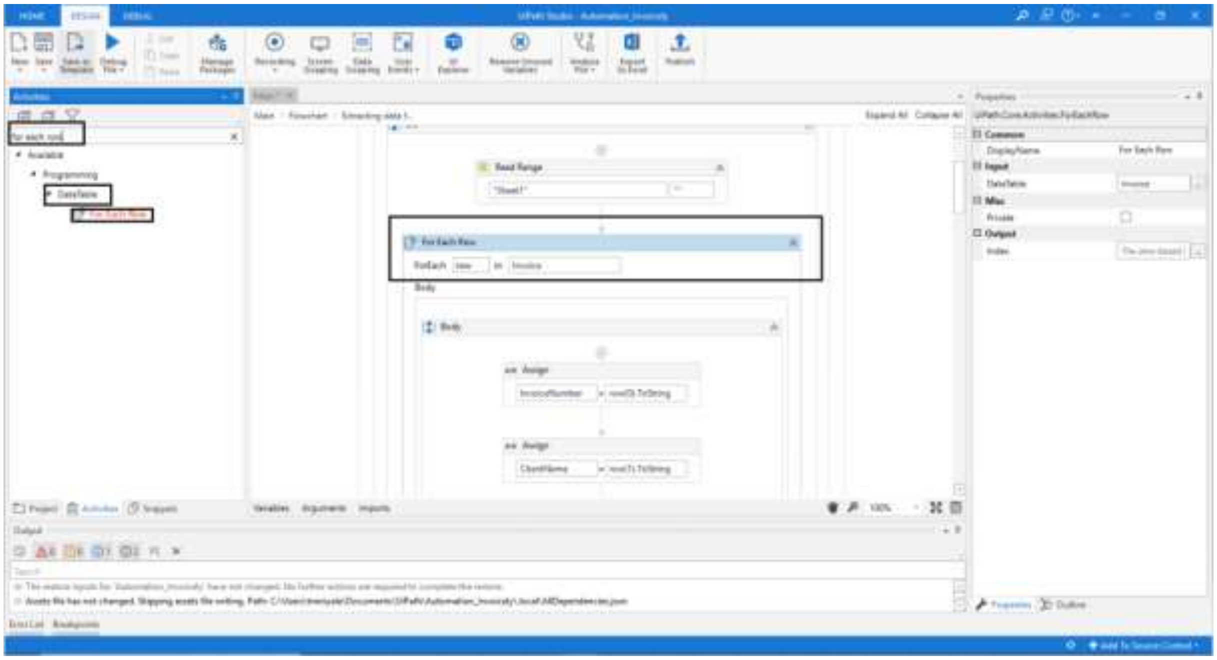


Use the **Read Range Activity** inside **Excel Application Scope** to store all the data into the Data Table. Creating a **variable** for storing the Output.

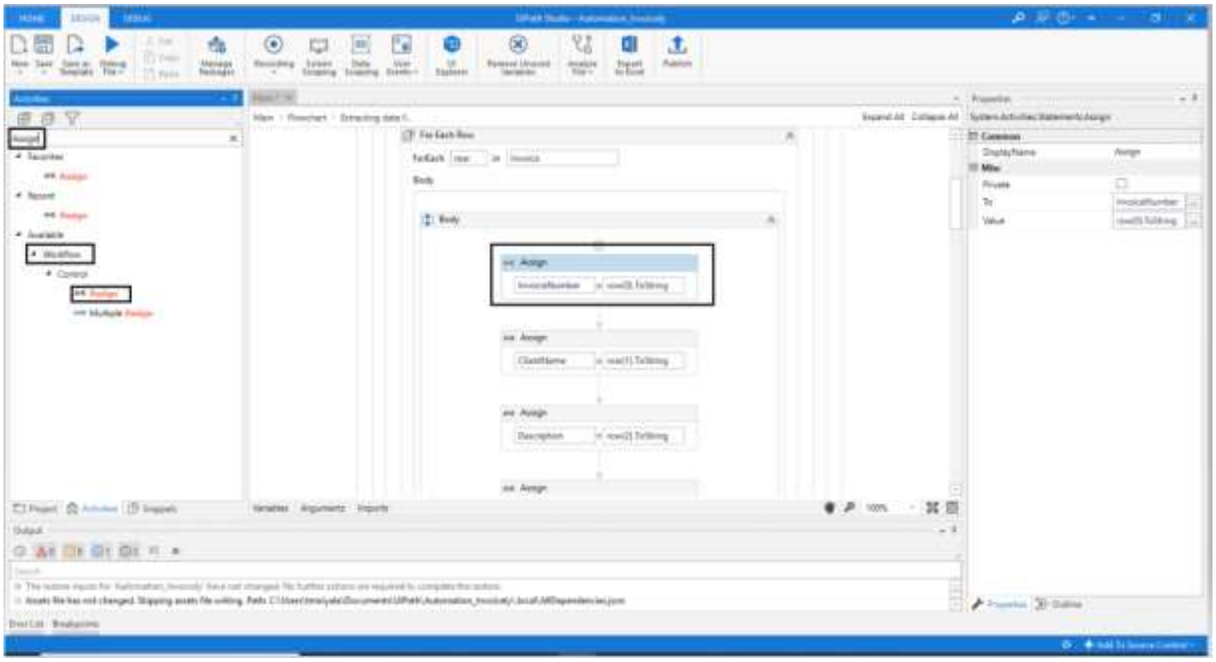


If we want to iterate for each row in the data table we will use the for each row activity.

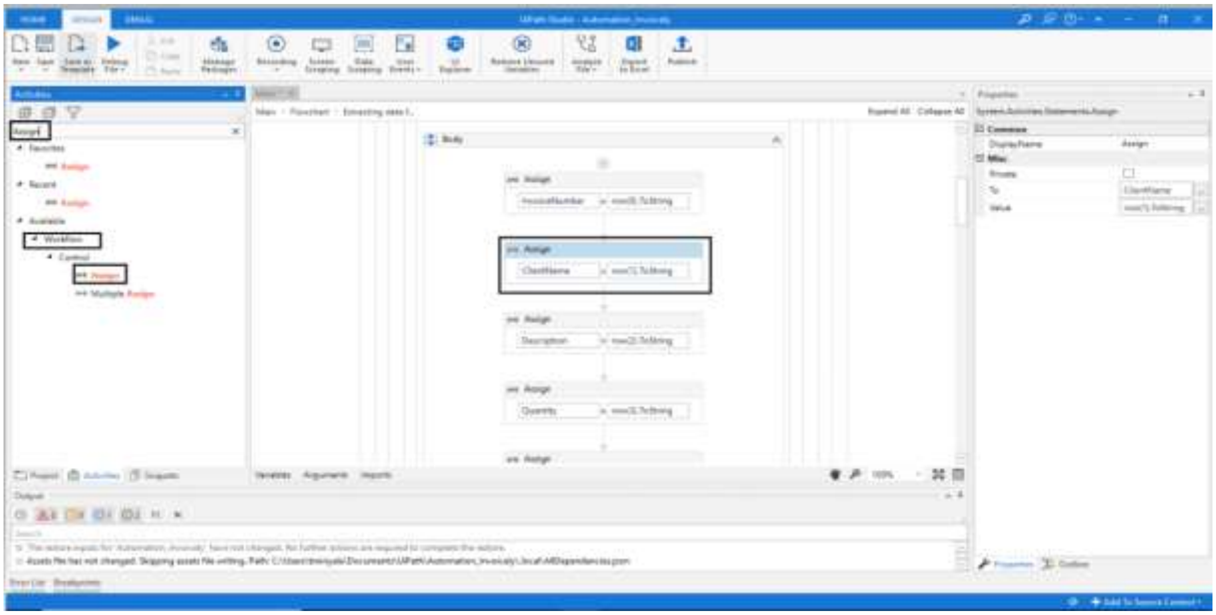
Drag and drop **For Each Row activity** to iterate the each row in the data table.



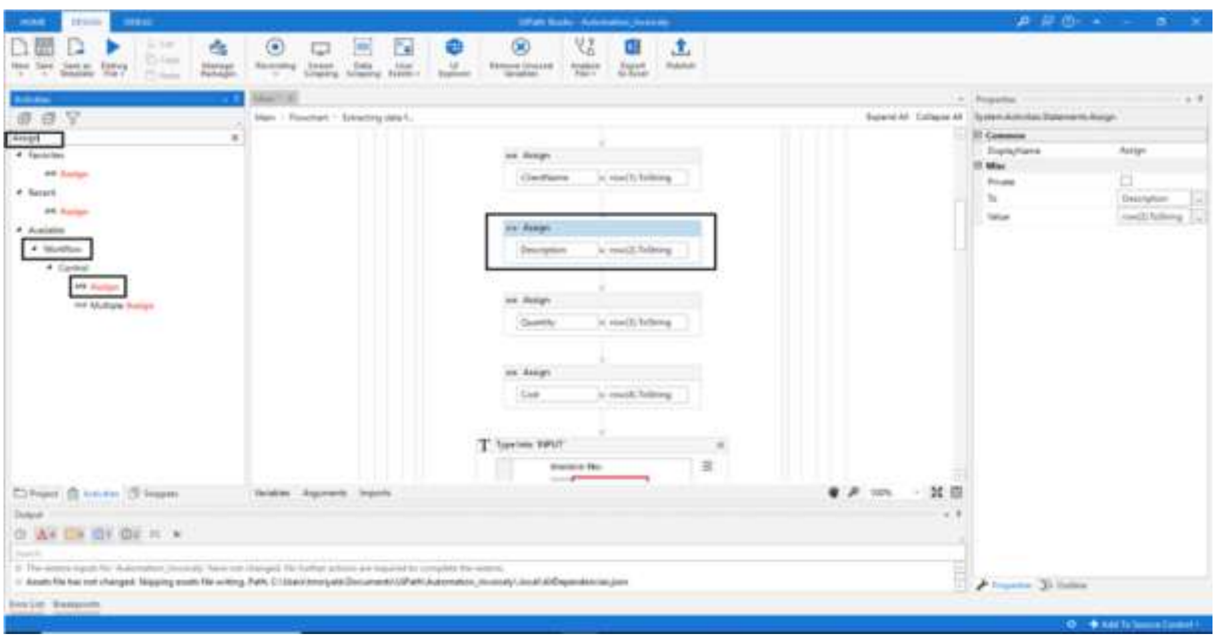
Creating a **Variable** by using the **Assign activity** and enter **Invoice Number** in **TO** and **row (0).ToString in Value** for getting the value from the data table.



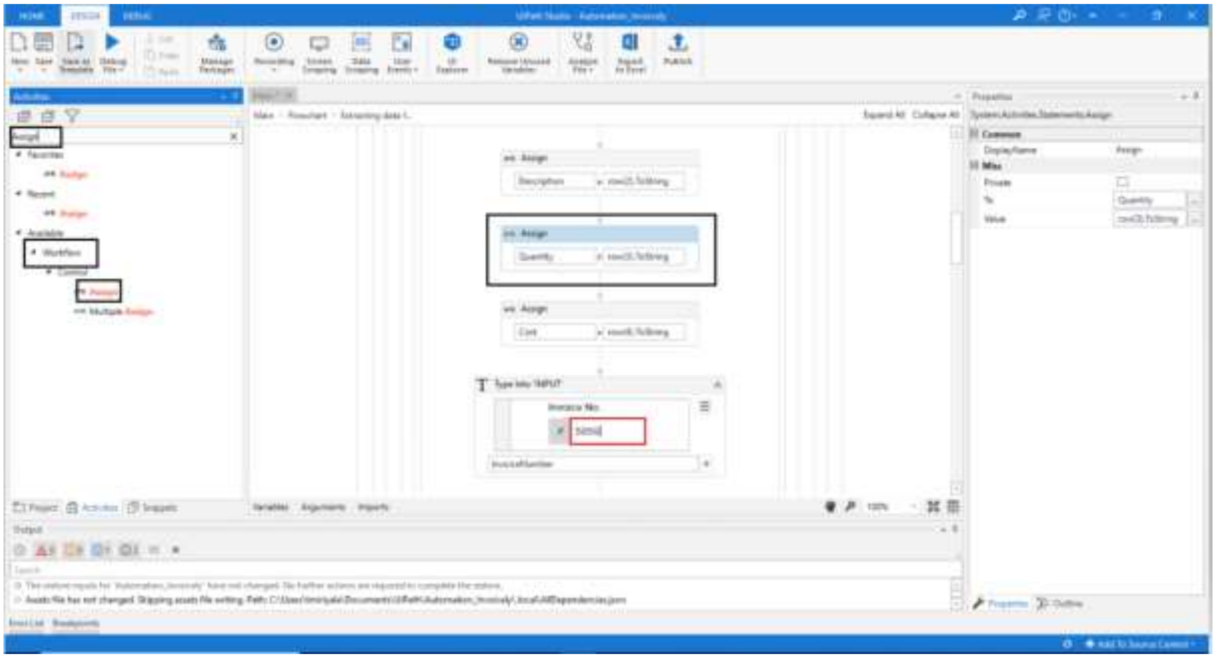
Creating a **Variable** by using the **Assign activity** and enter **ClientName** in **TO** and **row (1).ToString in Value** for getting the value from the data table.



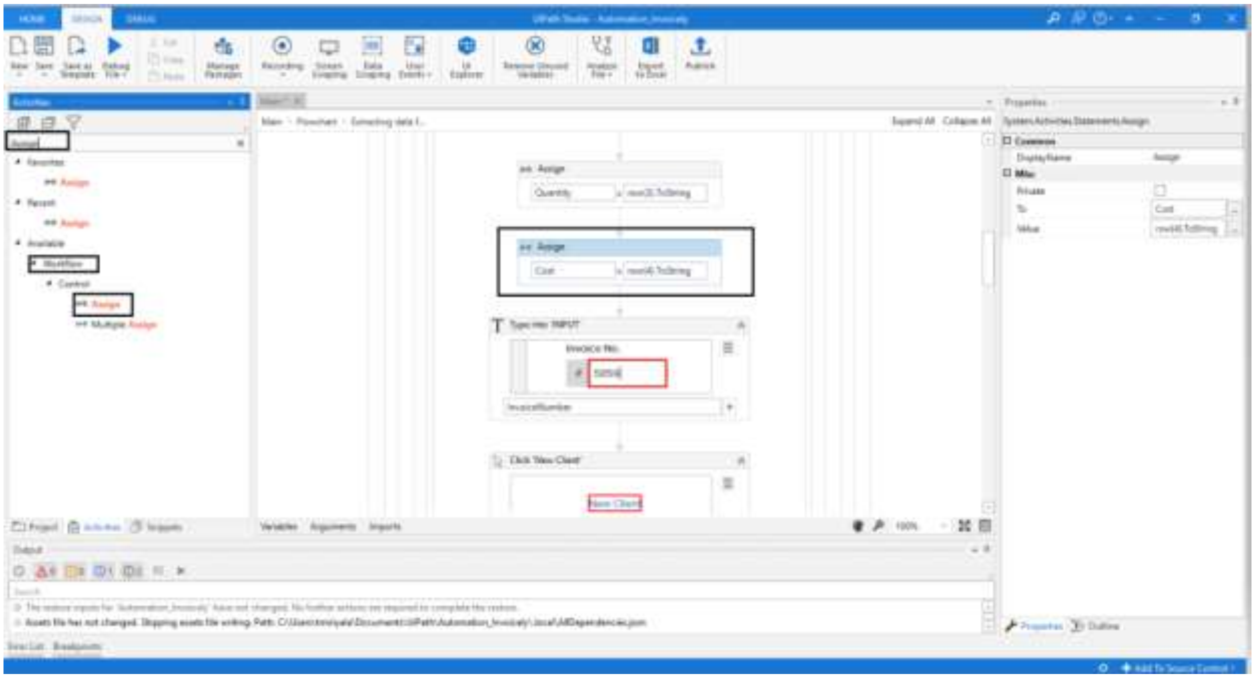
Creating a **Variable** by using the **Assign activity** and enter **Description** in **TO** and **row (2).ToString in Value** for getting the value from the data table.



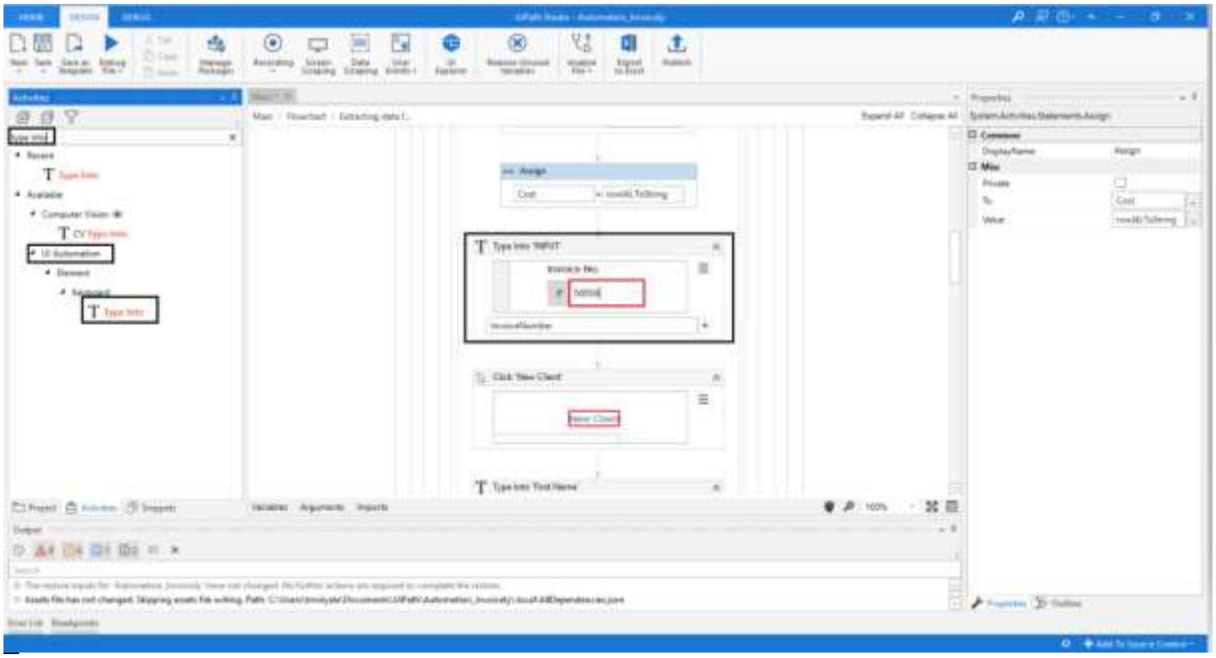
Creating a **Variable** by using the **Assign activity** and enter **Quantity** in **TO** and **row (3).ToString in Value** for getting the value from the data table.



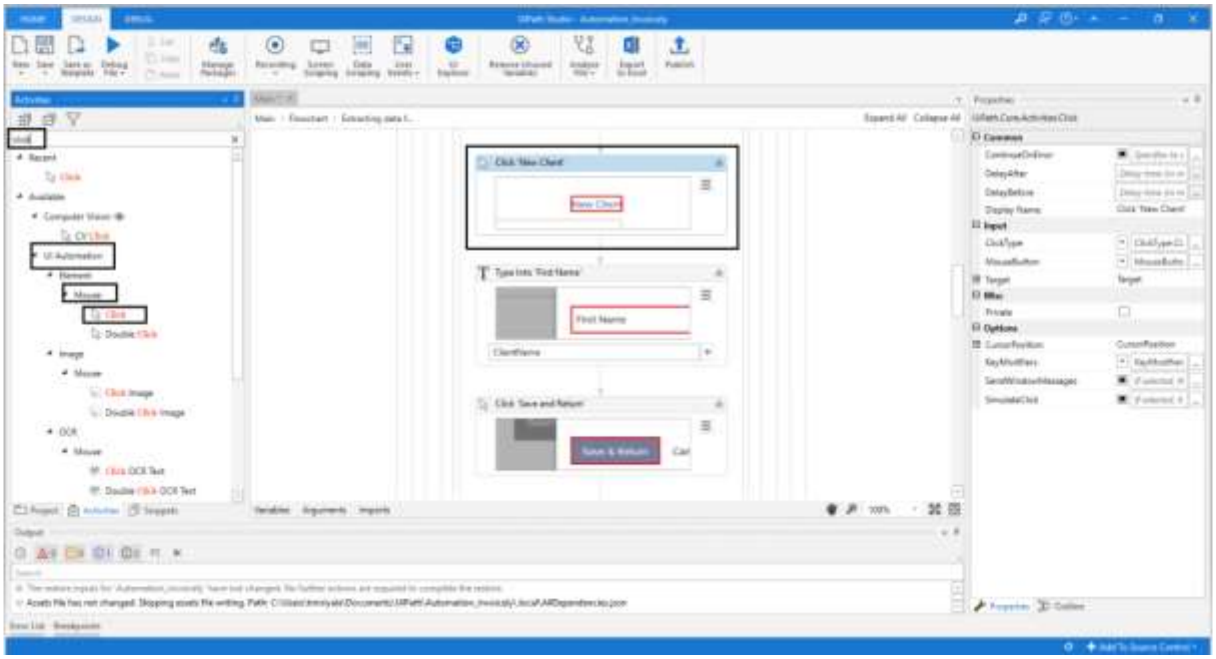
Creating a **Variable** by using the **Assign activity** and enter **Cost** in **TO** and **row (4).To String in Value** for getting the value from the data table.



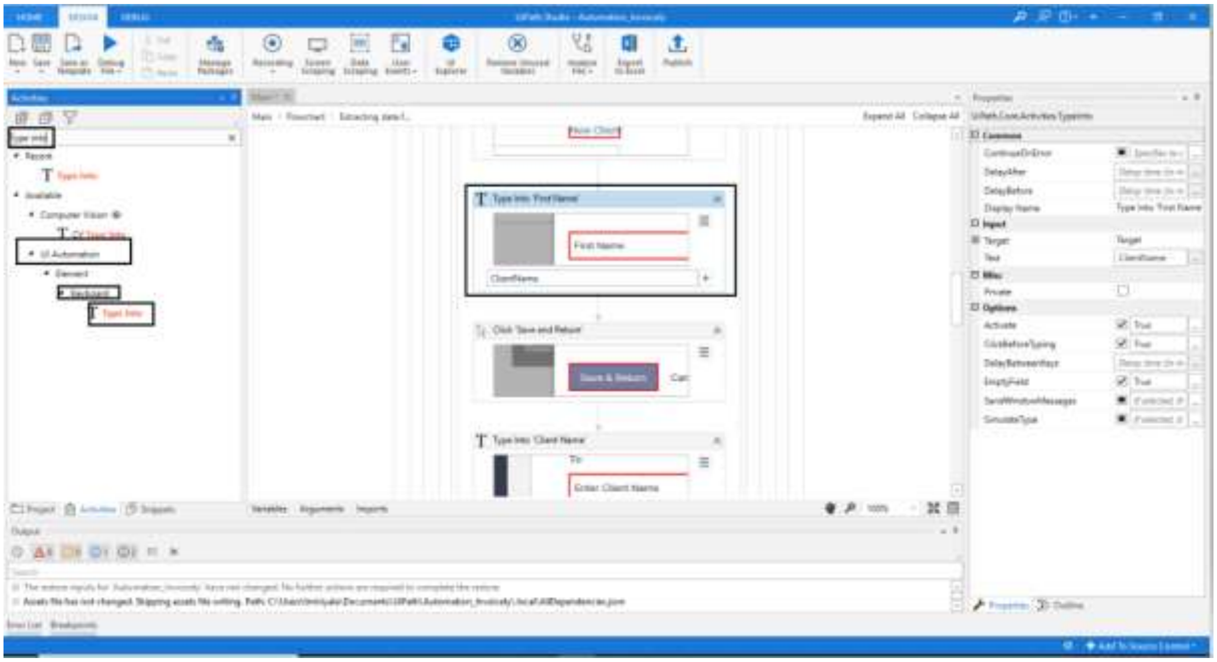
Drag and drop **UI Automation Activities.** Indicating each **Text box** to enter the read value. Drag and Drop **Type Into** Activity and indicate the screen to identify the Invoice number element and pass the Invoice number variable into the activity.



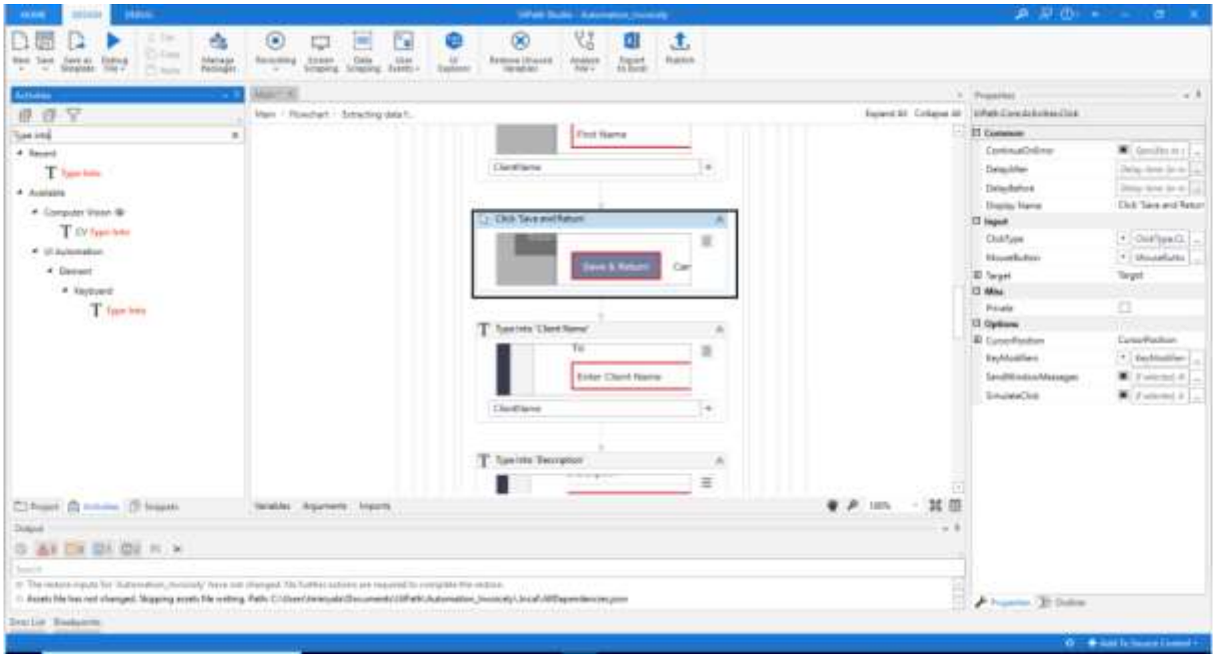
Drag and Drop **Click** Activity and indicate the screen to identify the **New Client** element in the browser.



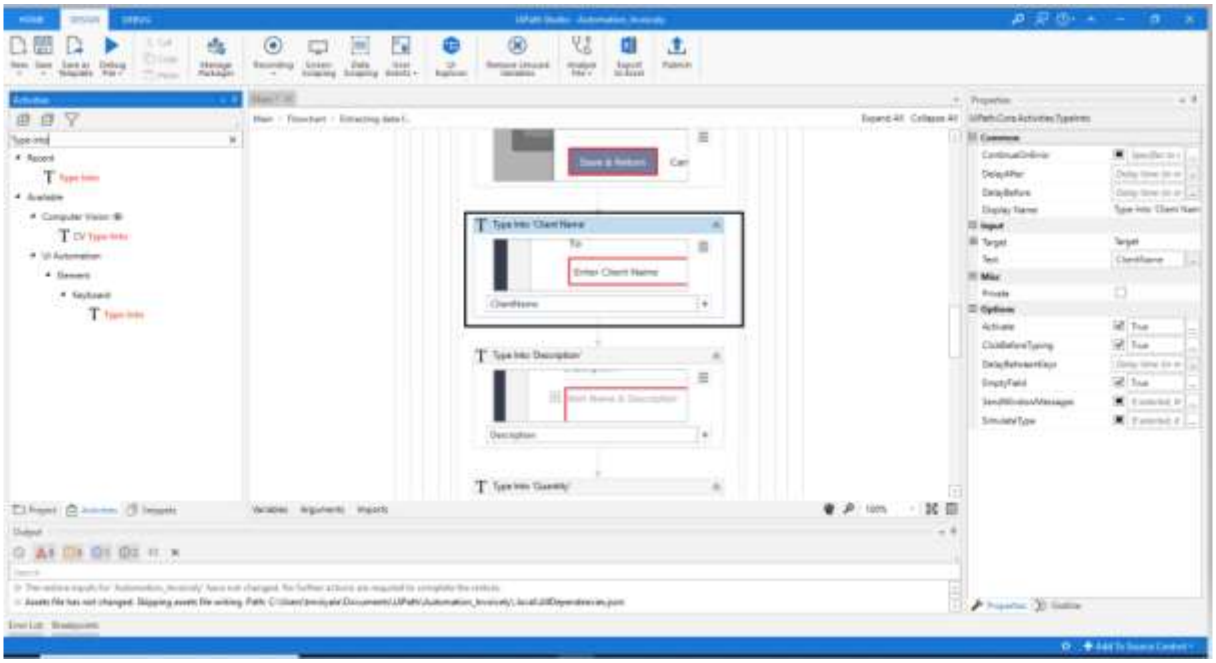
Drag and Drop **TypeInto** Activity and indicate the screen to identify the **First name** in the browser and pass the **ClientName** variable inside the activity.



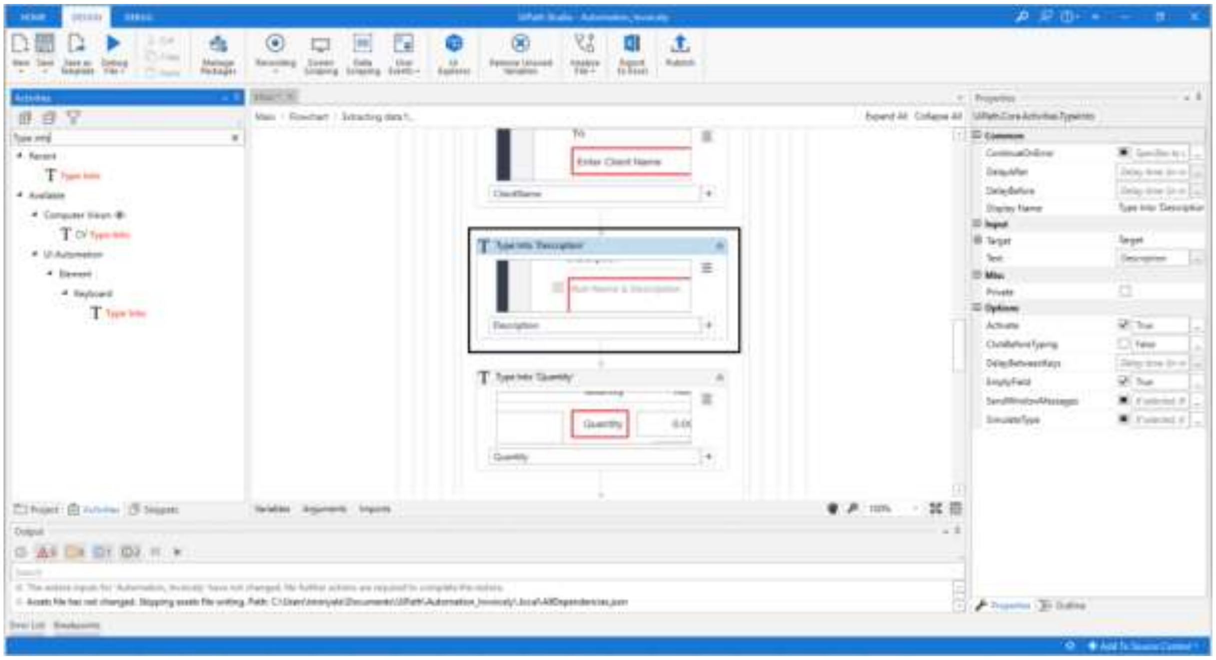
Drag and Drop **Click** Activity and indicate the screen to identify the **Save & Return** element in the browser.



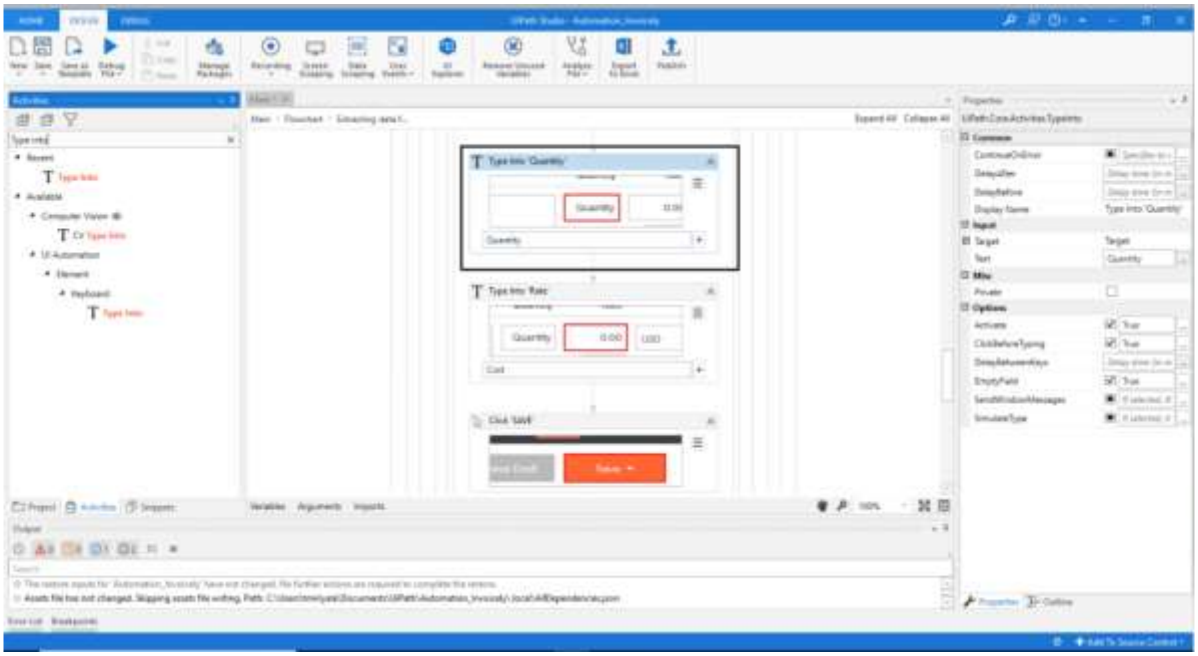
Drag and Drop **TypeInto** Activity.



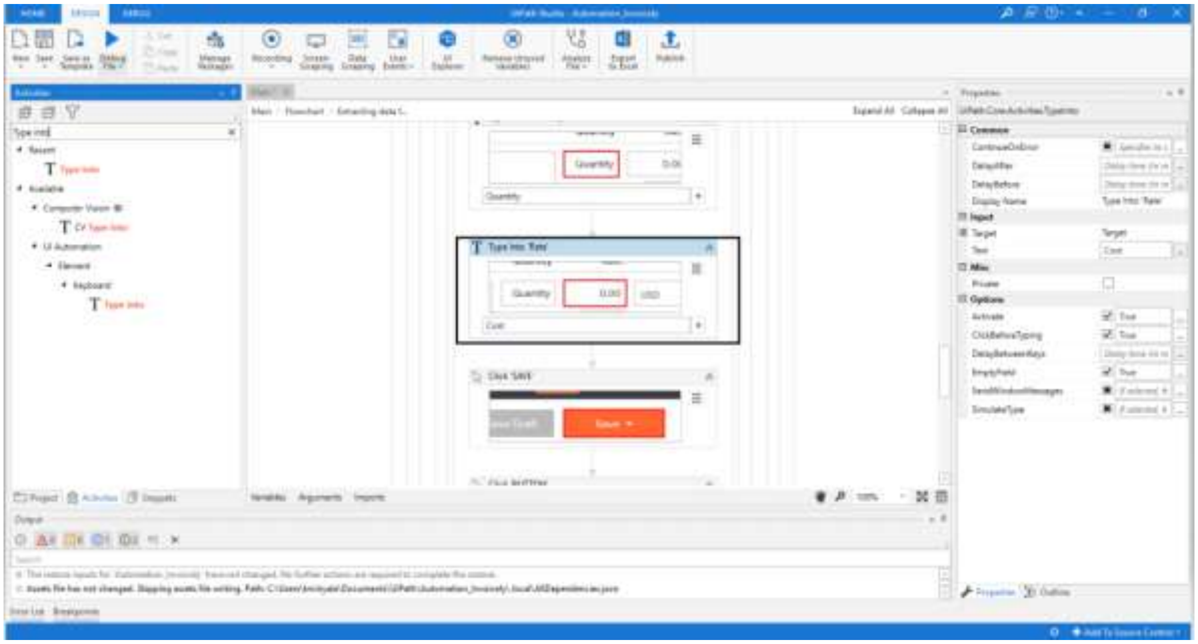
Drag and Drop **TypeInto** Activity and indicate the screen to identify the **Description** element inside the browser and pass the **Description** variable inside the **TypeInto** Activity.



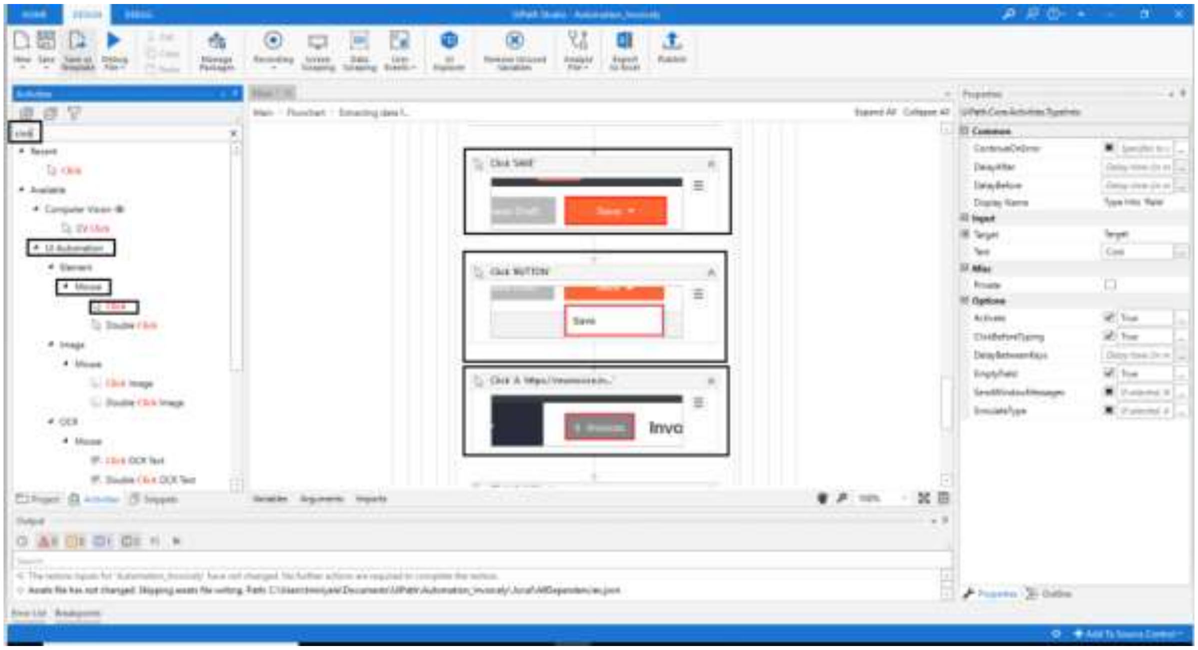
Drag and Drop **TypeInto** Activity and indicate the screen to identify the **Quantity** element inside the browser and pass the **Quantity** variable inside the **TypeInto** Activity.



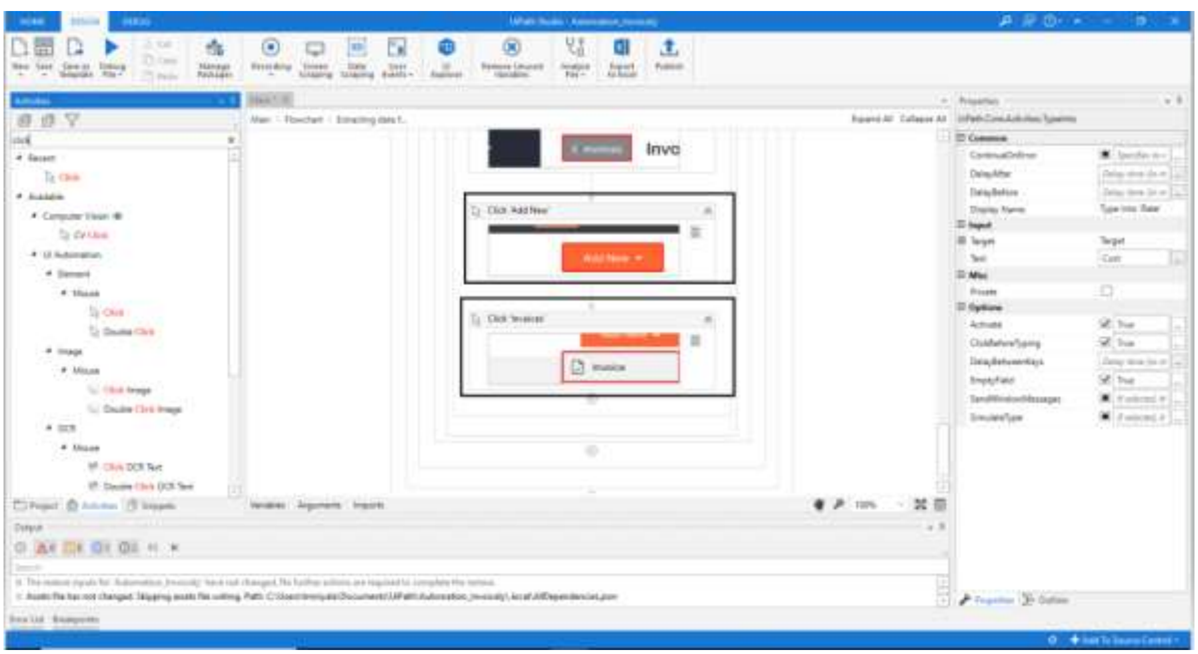
Drag and Drop **TypeInto** Activity and indicate the screen to identify the **Cost** element inside the browser and pass the **Cost** variable inside the **TypeInto** Activity.



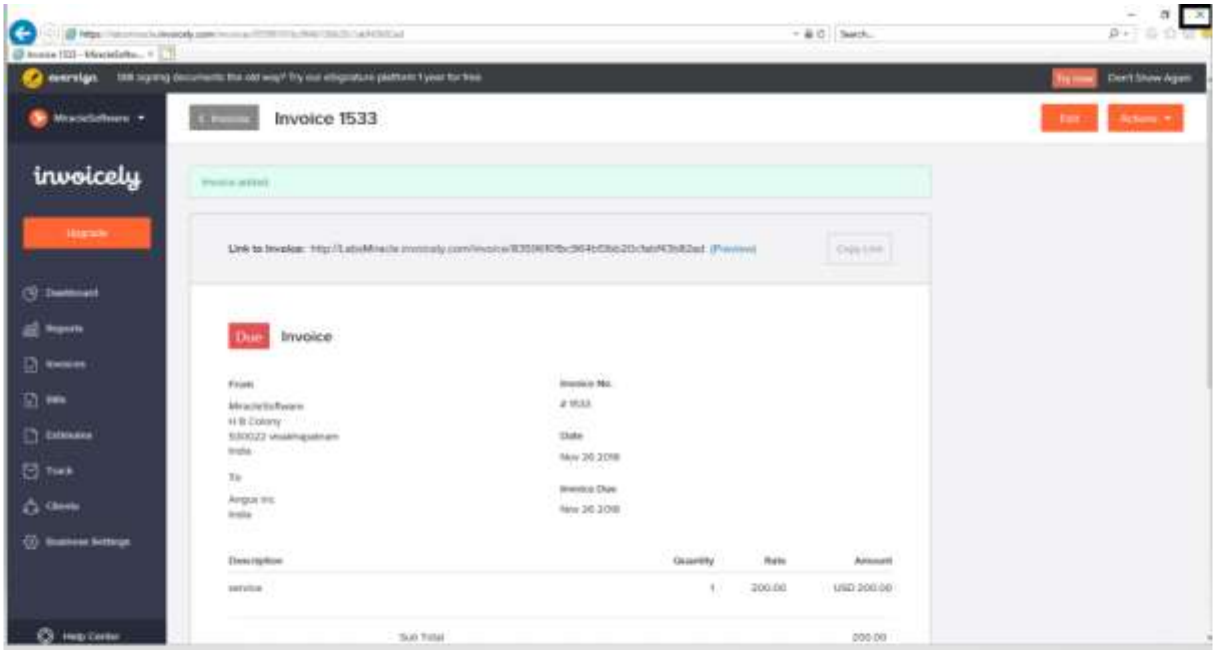
Drag and Drop **Click** Activity's and indicate the save element and use one more click activity to indicate on the **Invoice** to go back to the Invoice page



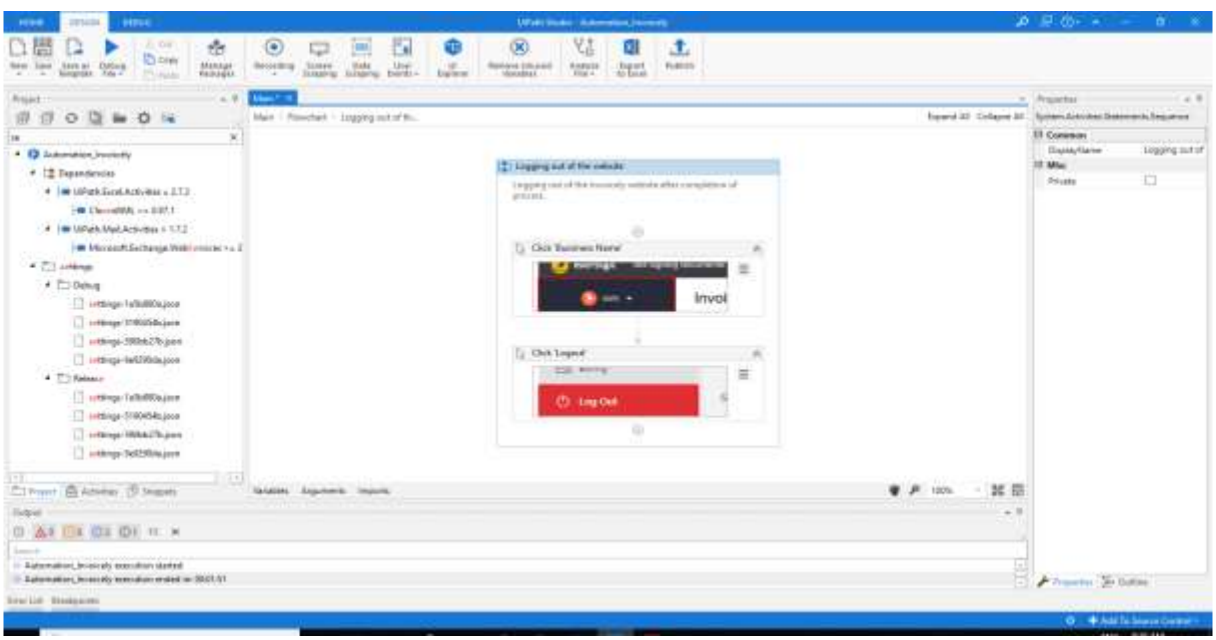
Drag and Drop **Click** Activity's and indicate the screen to identify the elements for Add New element. After that use one more Click activity to identify the Invoice element by pressing F2 and click on Add New you will find the Invoice element then click on the invoice.



Finally this is the invoice generated for the data in the first row. In the same manner Invoices will be generated for multiple rows data automatically.

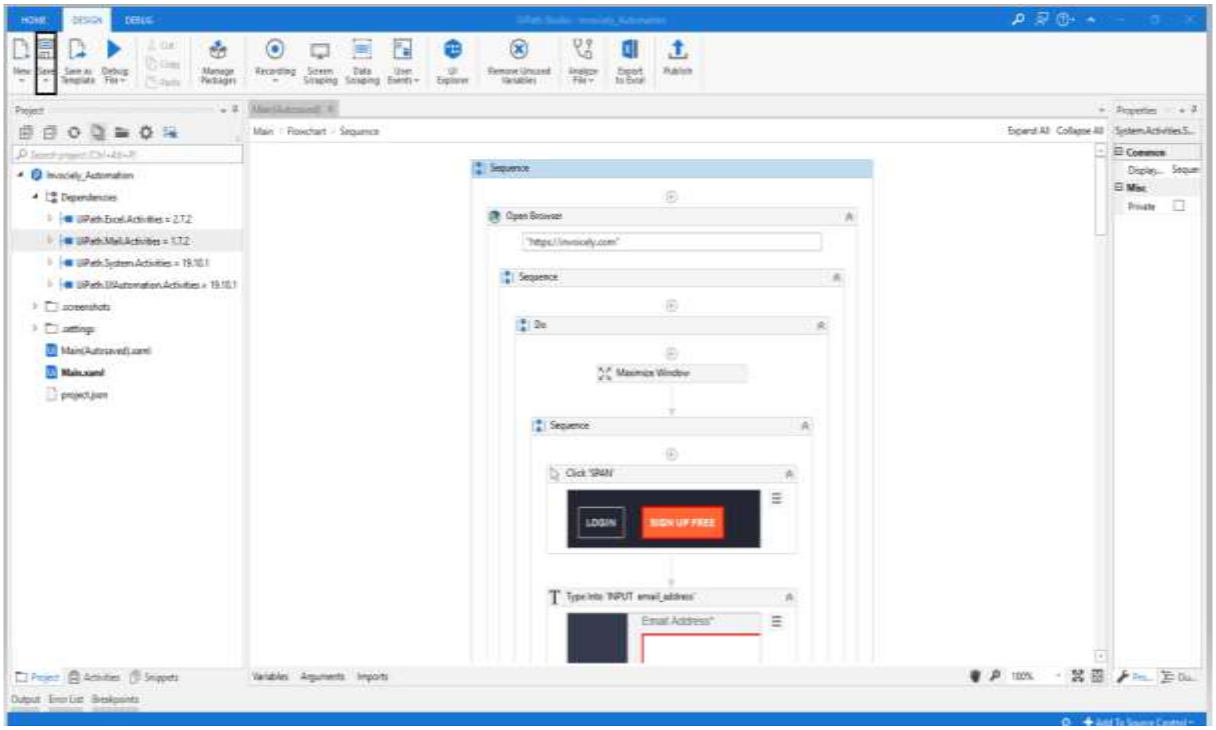


Finally close the Website Portal i.e., **Invoicely.com.**



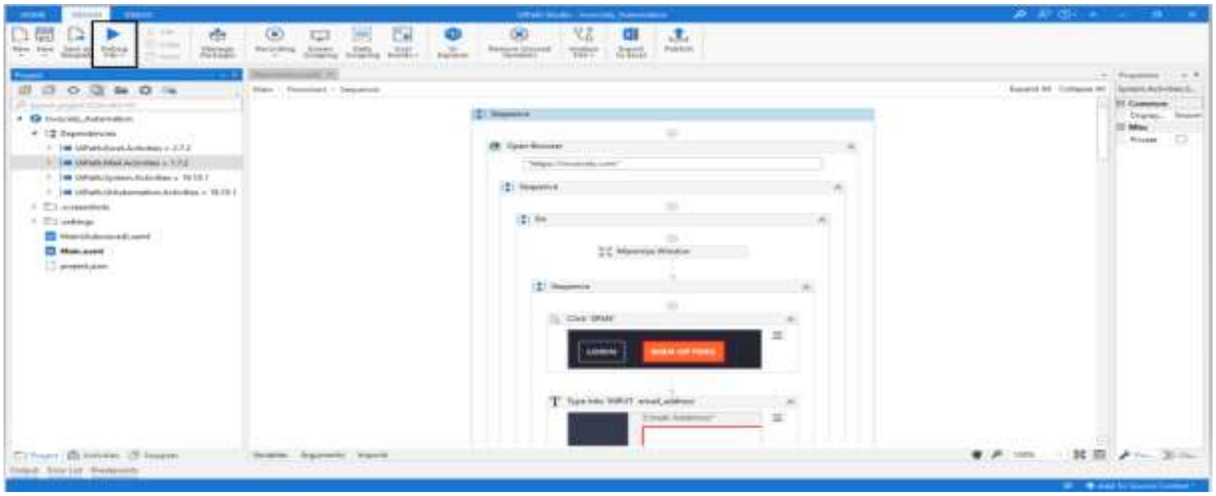
Step #5 | Saving a Workflow

Here, a Workflow is saved by pressing **Ctrl + s** or clicking on **Save.**

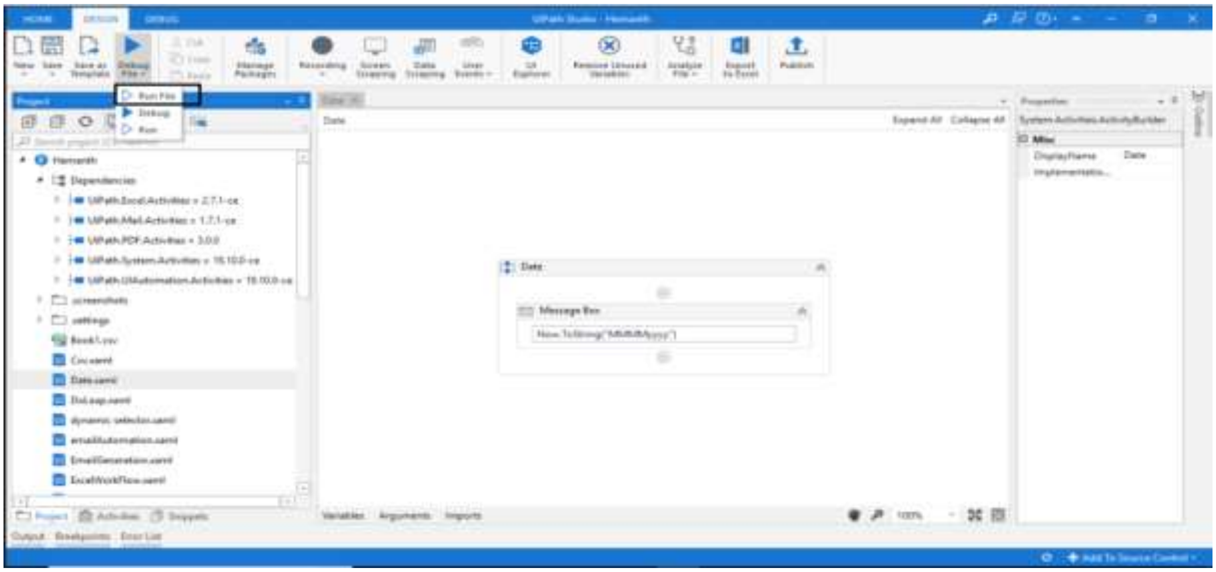


Step #6| Executing a Workflow

After saving the workflow, execute the bot.



In the **Debug File** drop down, we need to click on **Run File** to execute the bot.



Hurrah! You have successfully created a bot which can generate invoices.

For any questions regarding the lab please feel free to reach out to innovation@miraclesoft.com. We hope you enjoyed the session with us!