

E-Mail Automation Process using with Robusta RPA

In our process, we will first connect to an e-mail account and search for unread e-mails with a specific subject and an attached file. In the next step, we will forward each matching e-mail which meets certain condition to another e-mail account. For the e-mails which do not meet the condition, we will reply to the sender that the request is invalid.

The screenshot displays the Robusta RPA interface. On the left, a sidebar lists various actions, with 'Mail' expanded and 'Imap/Smtp connection' highlighted. The main workspace shows a process flow diagram for 'Booking Demo - Flight Route Email Requests, How To'. The flow starts with an 'Imap/Smtp connection: Connect to e-mail account' task, followed by a 'Script task: Find three days ago', then a 'Search: Emails for flight routes price request' task. A decision diamond follows, with a 'No request' path leading to an end node and a 'Request found' path leading to a 'Loop for each e-mail request'. Inside the loop, there is a 'Read/Save/Attachment: Download to processing folder' task and a 'Get size: Attached file count' task. Below the diagram, the configuration for the 'Imap/Smtp connection: Connect to e-mail account' task is shown, including fields for ID, Name, Configuration name, and various connection parameters like host, user, password, port, and SSL settings.

Imap/Smtp connection: Connect to e-mail account			
ID :	9d521440c5-7966-4A...		
Name :	Imap/Smtp connection ...		
Configuration name :	connectionName		
* Imap host :	imap.gmail.com		
* Imap user :	robustamailtest@gmail...		
Imap ssl :	<input checked="" type="checkbox"/>		
Imap tls required :	<input type="checkbox"/>		
Asynchronous :	<input checked="" type="checkbox"/>		
Documentation :	No value		
* Connection name :	testCon		
* Imap port :	993		
* Imap password :	Robustamail		
Imap tls enabled :	<input type="checkbox"/>		
* Smtip host :	smtp.gmail.com		

Mail > Imap/Smtp connection	
Name	Imap/Smtp connection : Connect to E-mail account
Configuration Name	connectionName
*Connection name	testCon
*Imap host	imap.gmail.com
*Imap user	E-mail address for IMTP protocol.
Imap ssl	<input checked="" type="checkbox"/>
*Smtp port	587
*Smtp password	\${password}
Smtp tls enabled	<input checked="" type="checkbox"/>
*Imap port	993
*Imap password	\${password}
*Smtp host	smtp.gmail.com
*Smtp user	E-mail address for SMTP protocol.
Smtp tls required	<input checked="" type="checkbox"/>

P.S: Enter the name of the user e-mail address you want to connect to.

- We started our process first by using the IMAP-SMTP Connection activity under the Mail section to connect to the e-mail account. Just drag and drop the activities you want to add to the process flow into the design area.
- While SMTP protocol is used for sending e-mail; IMAP protocol is used for e-mail reading. You can easily learn the parameter values for this component from the website of the e-mail account provider. Since we will connect to the Gmail account, we get this information and other necessary configurations from the relevant page of Google <https://support.google.com/mail/answer/7126229?hl>
- This table contains information about how to set the parameters. According to the information here, we filled the relevant fields in the IMAP SMTP connection activity. We entered the user email that we want to connect to, in Imap user and Smtpp user fields.

Incoming Mail (IMAP) Server	imap.gmail.com
	Requires SSL: Yes
	Port: 993
Outgoing Mail (SMTP) Server	smtp.gmail.com
	Requires SSL: Yes
	Requires TLS: Yes (if available)
	Requires Authentication: Yes
	Port for SSL: 465
	Port for TLS/STARTTLS: 587
Full Name or Display Name	Your name
Account Name, User name, or Email address	Your full email address
Password	Your Gmail password

- Then, in the Data Object field, which allows us to define a variable and use it in any activity in the process, we defined a variable named “password” and used it in the password fields. In order to reach Data Objects page which is shown bottom of the page, click Data Objects field in red highlighted below.

The image shows the Robusta interface with a process flow diagram and configuration details for a process named "Email Requests How-To".

Process Flow Diagram:

- Start node leads to "Imap/Smtp connection: Connect to e-mail account".
- Next is "Script task: Find three days ago".
- Then "Search: Emails for flight routes price request" with a note: "Search e-mails with the subject containing 'Flight Routes'".
- Followed by "Get size: Request count".
- A decision diamond: "Request found?".
 - If "No request", it goes to an end node.
 - If "Request found", it enters a loop: "Loop for each e-mail request".
- Inside the loop, it goes to "Read/Save/Attachment: Download to 'archive' folder".
- Then "Get size: Attached file count".
- Ends at an end node.

Process Navigator:

- Process: Email Requests How-To
- Loop for each e-mail request

Configuration Details:

- only):
- Is executable?: ☒
- Execution listeners: 0 execution listeners
- Signal definitions: No signal definitions configured
- Escalation definitions: No escalation definitions configured
- Potential starter group: No value
- Set a specific history level for this process definition: No value
- Data Objects: 6 data objects** (highlighted in red)
- Event listeners: 0 event listeners
- Message definitions: No message definitions configured
- Potential starter user: No value
- Eager execution fetching: ☐

The image shows a dialog titled "Change value for 'Data Objects'".

Table:

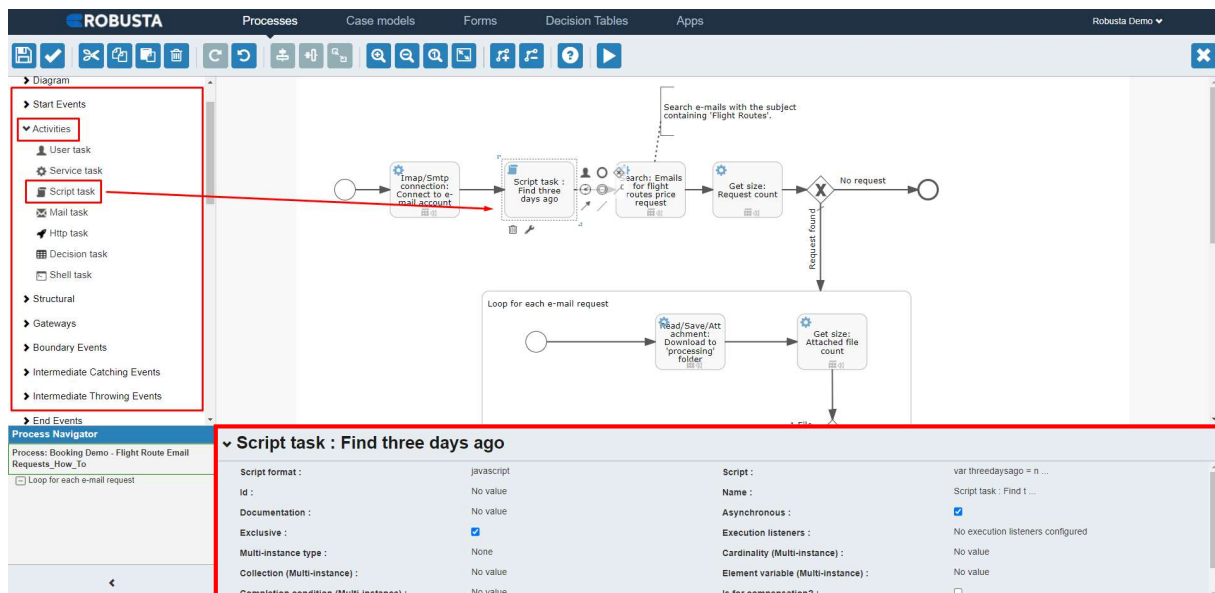
Id	Name	Type	Default Value
minBpPriority	minBpPriority	string	51
humanEffort	humanEffort	string	0
outputPath	outputPath	string	C:\RobustaDemoProj...
successPath	successPath	string	C:\RobustaDemoProj...
failPath	failPath	string	C:\RobustaDemoProj...
password	password	string	[Redacted]

Text: No data objects configured

P.S: Enter the password of the user e-mail address to Default Value

Buttons: ↑, ↓, +, -

- After the connection is done, we found the date three days before today, which we want to use as the minimum date in the Mail search activity, with the Script Task activity. We used javascript to find the date.
- The MinDate variable here will be used to find e-mails less than 3 days old. We wrote the variable name between curly braces after a dollar sign which is the standard way referring to a variable. Example: \${password}



Activities > Script task	
Script format	javascript
Name	Script task : Find three days ago
Exclusive	<input checked="" type="checkbox"/> True
Script	<pre>var threeDaysAgo = new Date(); threeDaysAgo.setDate(threeDaysAgo.getDate()-3); var date = threeDaysAgo.toLocaleDateString(); var splitDate = date.split("-"); var year = splitDate[0]; var month = splitDate[1]; var day = splitDate[2]; var minDate = day+"."+month+"."+year; execution.setVariable("minDate", minDate);</pre>

- After this step, we used the Search activity under the Mail section and in the connection name field, we selected the connection reference name that we defined in the first activity from the list. Then, we found the e-mails with the subject containing the phrase “Flight Routes” and containing an attached file. For this, we wrote “Flight Routes” in the subject field and marked enable the “*Has Attachment*” box. We did not change the default value of INBOX in the Folder Name field, as we want the relevant search to be in the Inbox. Then, by selecting the unread box, we searched for unread e-mails, and we defined a variable in the dataset field to assign all e-mails’ data to a dataset.
- In this example, we set the e-mail limit to be searched as 10. This means that even if more than 10 e-mails are matching the search criteria, only the 10 most recent e-mails will be imported into the dataset.

The screenshot shows the Robusta BPMN editor interface. On the left, a sidebar lists various activities under the 'Mail' section, with 'Search' highlighted. The main canvas displays a BPMN diagram with a 'Search' activity. A red arrow points from the 'Search' activity in the sidebar to the configuration panel at the bottom. The configuration panel, titled 'Search: Emails for flight routes price request', contains the following details:

- Name:** Search: Emails for flight routes price request
- * Connection name:** \${testCon}
- From:** No value
- Search limit:** 10
- Min date:** \${minDate}
- Unread?:** ☒
- * Folder name:** INBOX
- Has attachment?:** ☒
- Subject:** Flight Routes
- * New Dataset name:** emailSearchDS

Mail > Search	
Name	Search : E-mails for flight routes price request
*Connection name	\${testCon}
Search limit	10
Min date	\${minDate}
Unread?	<input checked="" type="checkbox"/>
*Folder name	INBOX
Has attachment?	<input checked="" type="checkbox"/>
Subject	Flight Routes
*New Dataset name	emailSearchDS

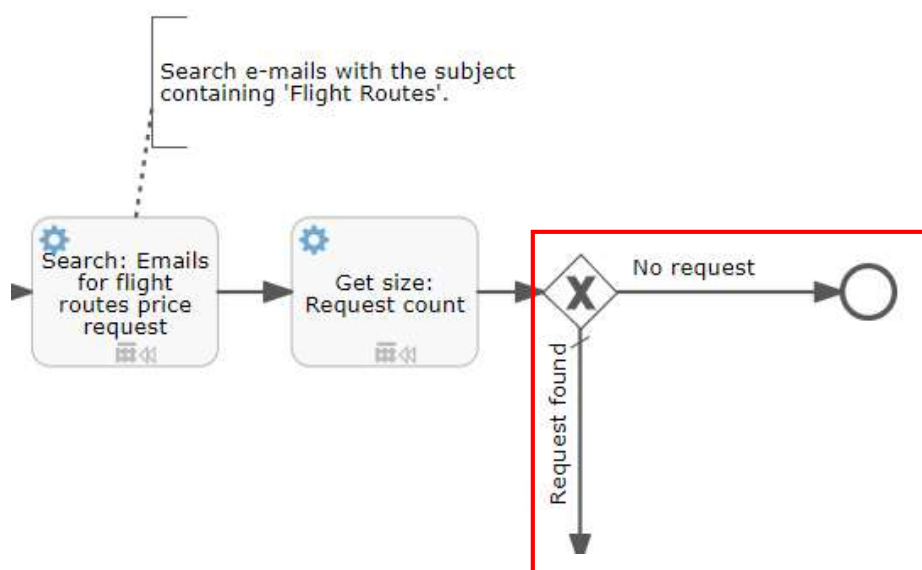
- After the search activity, we found the number of e-mails transferred to the dataset and assigned the result to a variable. Since we want the rows of the dataset to be counted here, we chose the ROW option in the Size Type field from the list.

The screenshot shows the Robusta interface with a process flow diagram. The process starts with a 'Find e-mail account' task, followed by a 'Script task: Find three days ago', then a 'Search: Emails for flight routes price request' task. This task is connected to a 'Get size: Request count' dataset action. A red box highlights the 'Dataset' menu on the left, with a red arrow pointing to the 'Get size' option. Another red box highlights the configuration panel for the 'Get size: Request count' action, showing the following details:

- Name:** Get size: Request count
- * Dataset name:** \${emailSearchDS}
- * Result variable name:** emailSearchDSSize
- Asynchronous:** ☒
- Documentation:** No value
- Size Type:** ROW

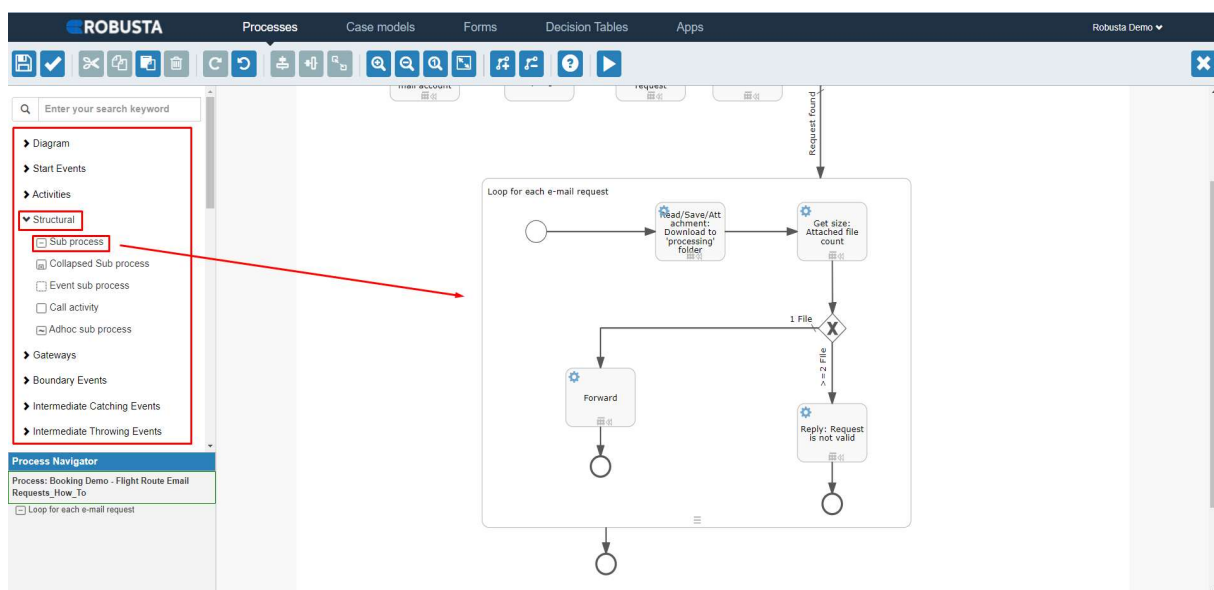
Dataset > Get size	
Name	Get size : Request count
*Dataset name	\${emailSearchDS}
*Result variable name	emailSearchDSSize
Size Type	ROW

- Then, the process is terminated if no e-mails are found, and the process continues if there is at least one e-mail. To do this, we used a gateway that allowed us to control how a process flows according to the conditions we set.
- For each arrow leaving the gateway, we set a condition expression according to the e-mail count variable. If the value of this variable is 0, we ended the process flow. Otherwise, we chose the default flow option, and we did not set any condition expression. The process will continue from here if it does not match a condition.



- “No request” flow condition ($\${emailSearchDSSize==0}$) checks whether emailSearchDSSize variable value is equal to ‘0’ which means there is no row in file. If this condition is met the process is completed with an end event. In the “Request found” flow condition, we chose the “default flow” option checked ☒ and did not set any condition expression.

- The process continues with a loop activity, since the operations will be done independently for each e-mail. We included the Sub-process activity from the Structure section to create a loop activity in the process. As in our main process, we need to create a flow with a beginning and end event in this sub-process.
- We need to define how many times this sub-process will be repeated in the “Cardinality” field. This will provide by using “*emailSearchDSSize*” variable.
- We chose the value of the Multi-instance type field as Sequential because we want each operation to be done sequentially. When we make the definitions, the “*loopCounter*” variable is automatically defined at the beginning of the loop. This variable, which first takes a value of 0 increases by 1 at each iteration. When the value of the “*loopCounter*” variable reaches the Cardinality value, the loop is automatically terminated.



Structural > Subprocess	
Name	Loop for each e-mail request
Cardinality	\${emailSearchDSSize}
Multi-instance type	Sequential
Exclusive	<input checked="" type="checkbox"/>

- In the loop, we first ensured that the e-mail we are processing with the Read/Save/Attachment activity is marked as read, the attached files list is transferred to a dataset, and the files attached are downloaded to the desired directory for archiving purposes.

Mail > Read/Save/Attachment Configuration:

Name :	Read/Save/Attachment : Dowload to 'archieve' folder	Asynchronous :	<input checked="" type="checkbox"/>
* Connection name :	Read/Save/Attachment ...	Documentation :	No value
Mail no :	\$(loopCounter)	* Dataset name :	\$(emailSearchDS)
Mark as deleted? :	<input type="checkbox"/>	Mark as read? :	<input type="checkbox"/>
Save mail? :	<input type="checkbox"/>	Save attachments? :	<input checked="" type="checkbox"/>
Attachment Dataset name :	AttachmentDS	Save path :	C:\RobustaDemoProjec ...

Mail > Read/Save/Attachment	
Name	Read/Save/Attachment : Dowload to 'archieve' folder
*Connection name	\$(testCon)
Mail no	\$(loopCounter)
Attachment Dataset name	AttachmentDS
*Dataset name	emailSearchDS
Mark as read?	<input checked="" type="checkbox"/>
Save attachments?	<input checked="" type="checkbox"/>
Save path	The location you want to save the files.

- In this step, similar to the use of the Get Size activity that we explained in the first parts of the process, we have found the row number of the dataset to which the list of the attached files is transferred.

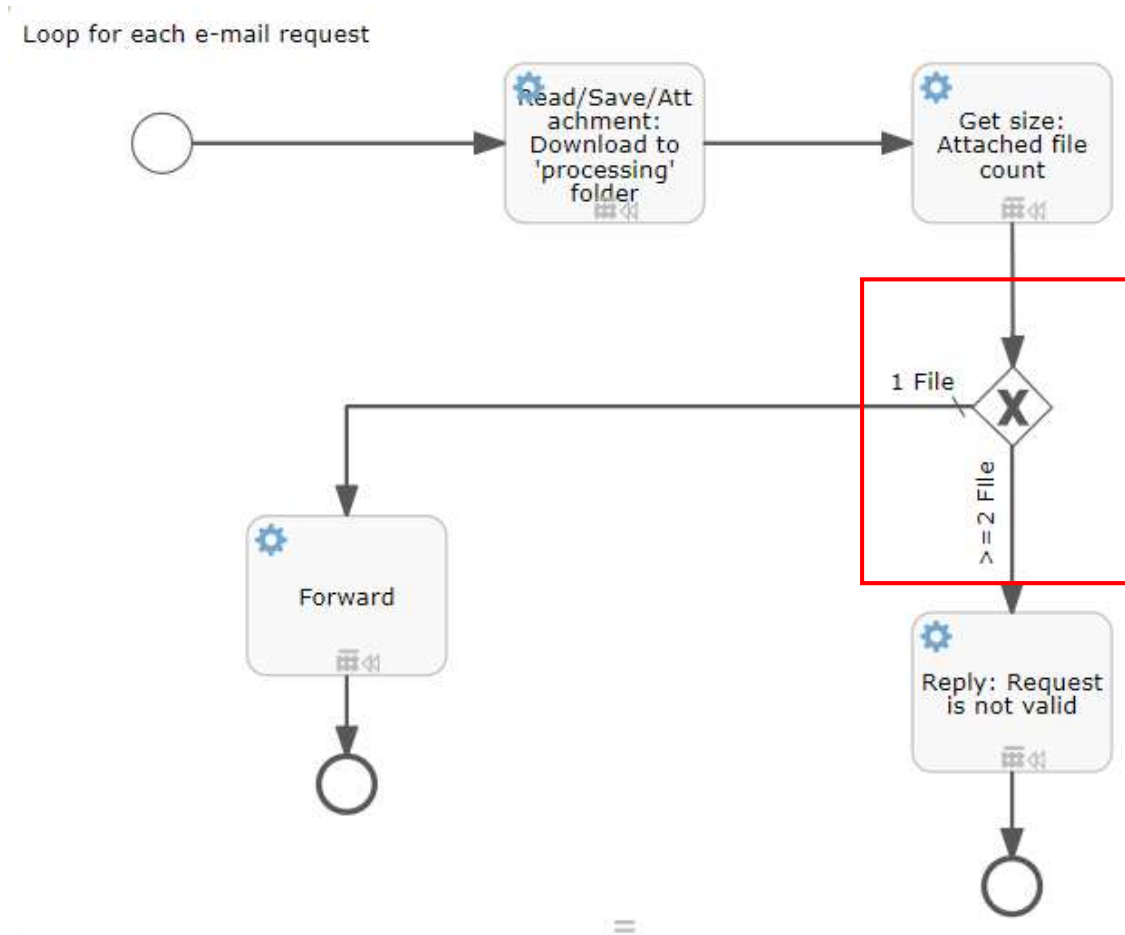
The screenshot displays the Robusta software interface. On the left, a sidebar contains a 'File Operations' menu with 'Dataset' expanded, and 'Get size' highlighted. A red line connects this menu item to the 'Get size: Attached file count' activity in the main process flow. The process flow includes a 'Loop for each e-mail request' containing a 'Read/Save/Attachment: Download to processing folder' activity, followed by the 'Get size: Attached file count' activity. Below the process flow, a detailed configuration panel for the 'Get size: Attached file count' activity is shown, with fields for ID, Name, Dataset name, Result variable name, Asynchronous status, Documentation, and Size Type.

Get size: Attached file count

Id :	sid-D7E8E636-4DEF-4D...	Asynchronous :	<input checked="" type="checkbox"/>
Name :	Get size: Attached f...	Documentation :	No value
* Dataset name :	\${AttachmentDS}	Size Type :	ROW
* Result variable name :	listFileDSSize		

Dataset > Get size	
Name	Get size : Attached file count
*Dataset name	\${AttachmentDS}
*Result variable name	listFileDSSize
Size Type	ROW

- After finding the number of attached files, we added another gateway to the process as we want to perform a different operation if there is more than 1 attached file, and a different operation if there is only 1 file.



- “ ≥ 2 File” flow condition ($\${listFileDSSize} \geq 2$) checks whether “*listFileDSSize*” variable value is greater than or equal to “2” which means there is more than one attached file. In the “1 File” flow condition, we chose the “*default flow*” option checked ☒ and did not set any condition expression.

- If there is more than one attached file, the flow continues with Reply activity, and the message “*Cannot process more than one attached file*” is returned as a response to the sender by mail. Then we completed our Sub-process flow with an End event.

The screenshot shows the ROBUSTA interface with a workflow diagram and the configuration for a 'Reply: Request is not valid' activity.

Workflow Diagram:

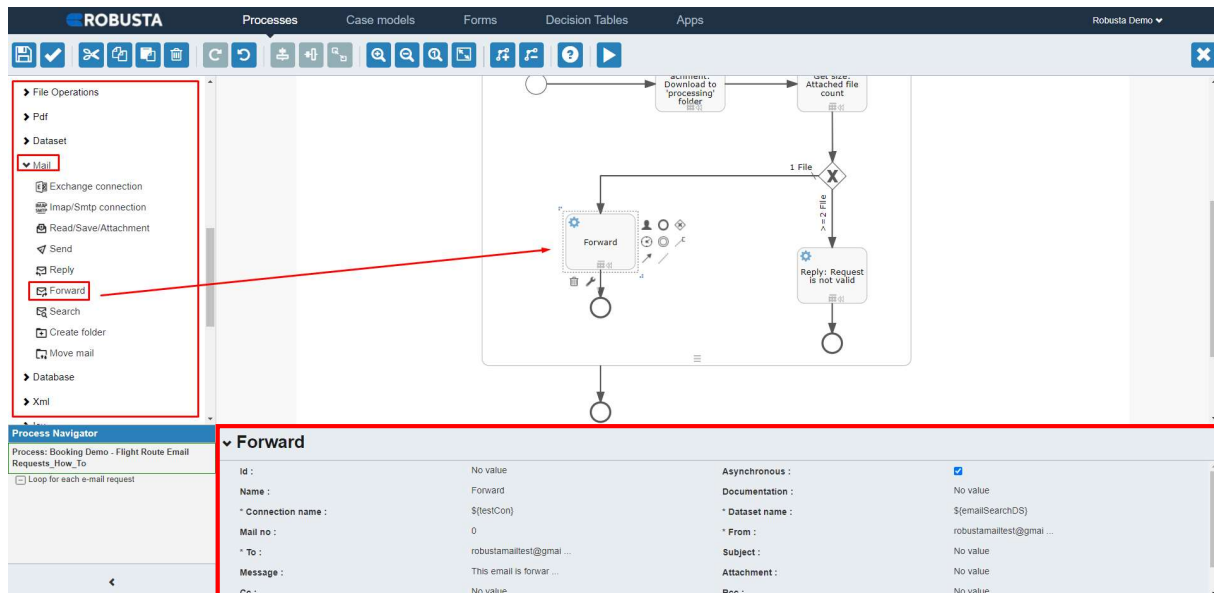
- The diagram is titled "Loop for each e-mail request".
- It starts with a start event (circle) leading to a "Read/Save/Attachment: Download to processing folder" activity.
- From there, it goes to a "Get size: Attached file count" activity.
- A decision diamond follows, with a condition "1 File".
- If the condition is met (Yes), the flow goes to a "Forward" activity and then to an end event (thick circle).
- If the condition is not met (No), the flow goes to a "Reply: Request is not valid" activity and then to an end event (thick circle).

Activity Configuration: Reply: Request is not valid

Id :	sid-0E950BFB-953E-46 ...	Asynchronous :	<input checked="" type="checkbox"/>
Name :	Reply: Request is no ...	Documentation :	No value
* Connection name :	\${testCon}	* Dataset name :	\${emailSearchDS}
Mail no :	\${loopCounter}	Message :	Birden fazla ekli do ...
Attachment :	No value	Cc :	No value
is HTML? :	<input type="checkbox"/>	Reply all? :	<input checked="" type="checkbox"/>

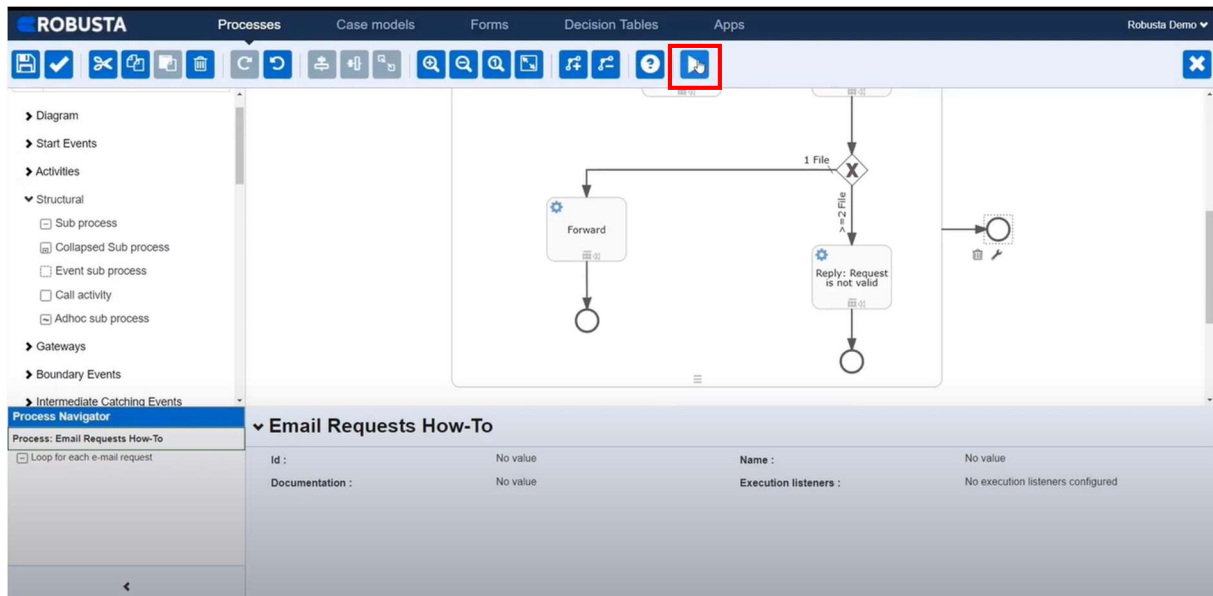
Mail > Reply	
Name	Reply : Request is not valid
*Connection name	\${testCon}
Mail no	\${loopCounter}
Is HTML?	<input checked="" type="checkbox"/>
*Dataset name	\${emailSearchDS}
Message	Cannot process more than one attached file
Reply all?	<input checked="" type="checkbox"/>

- If there is 1 file attached, the e-mail is forwarded to another e-mail address with the Forward activity. In this activity, the from and to e-mail addresses, e-mail no, subject, and message fields are defined. We completed our subprocess flow with an End event. Then we used another end event to terminate the main process.

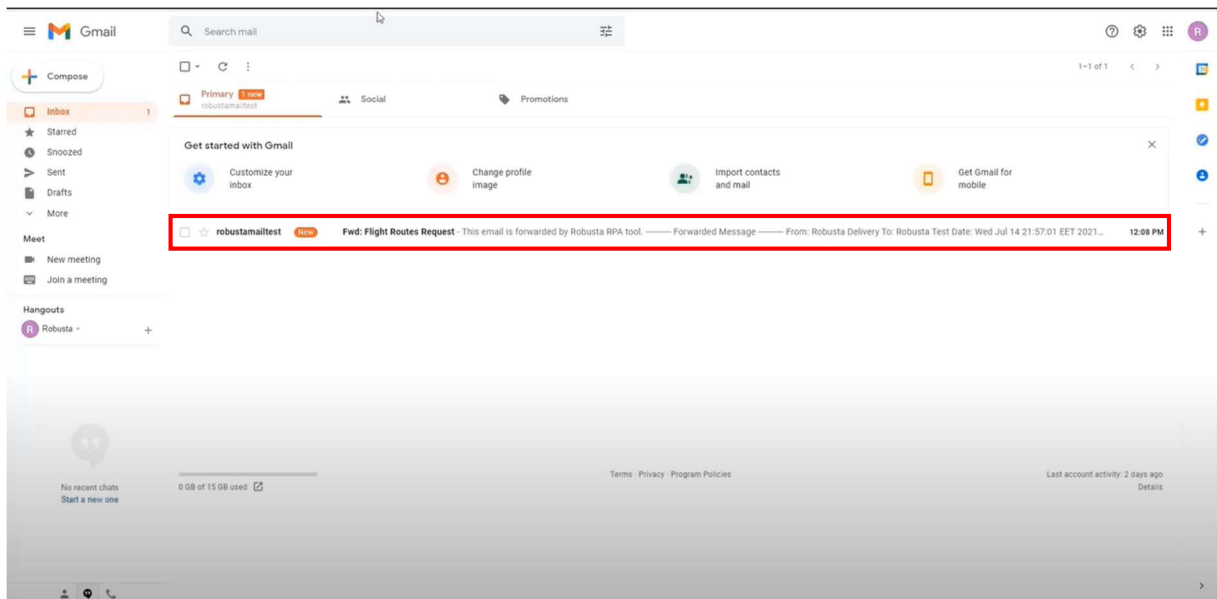
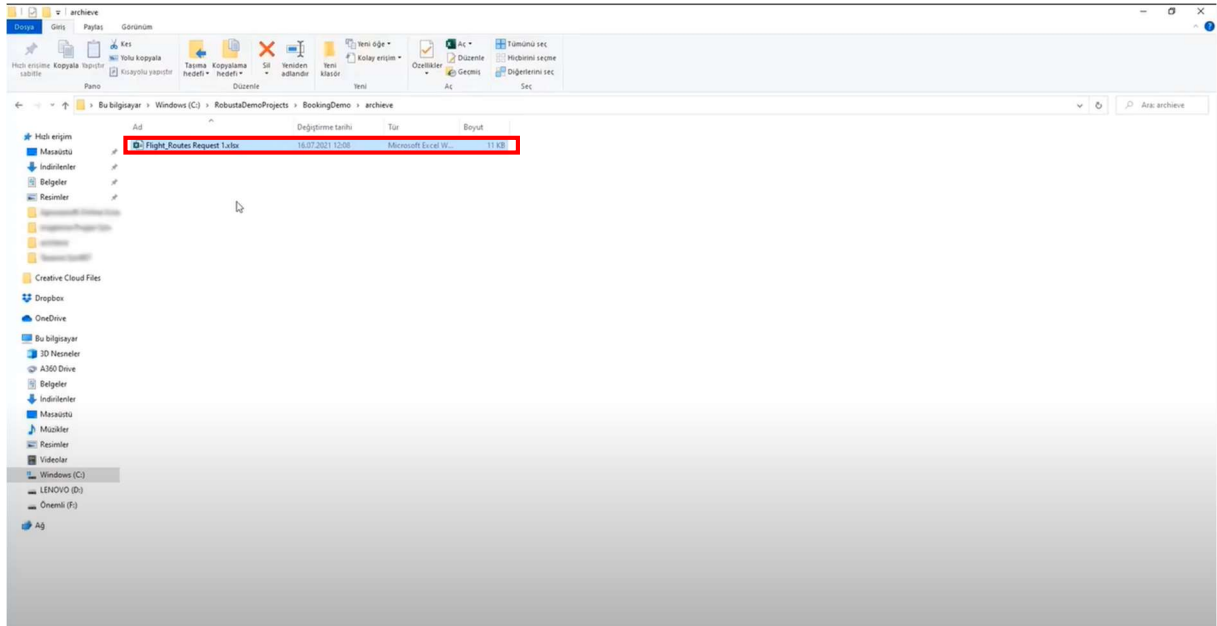


Mail > Forward	
Name	Forward
*Connection name	\${testCon}
Mail no	\${loopCounter}
*To	recipient's e-mail address
Message	This mail is forwarded by Robusta RPA tool.
*Dataset name	\${emailSearchDS}
*From	sender's e-mail address

- Now let's run our process by clicking the Run button. Since the activities used in this process work at the backend, we do not see any action on the screen.



- As a result, the attachments are downloaded to the specified folder and the e-mail is successfully forwarded to our e-mail account.



We have come to the end of our How-to tutorial. We hope it was useful for you.