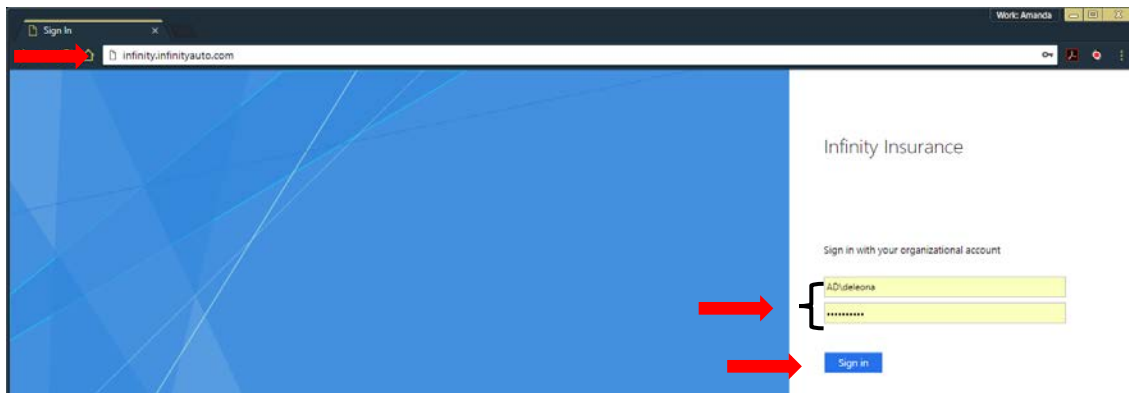


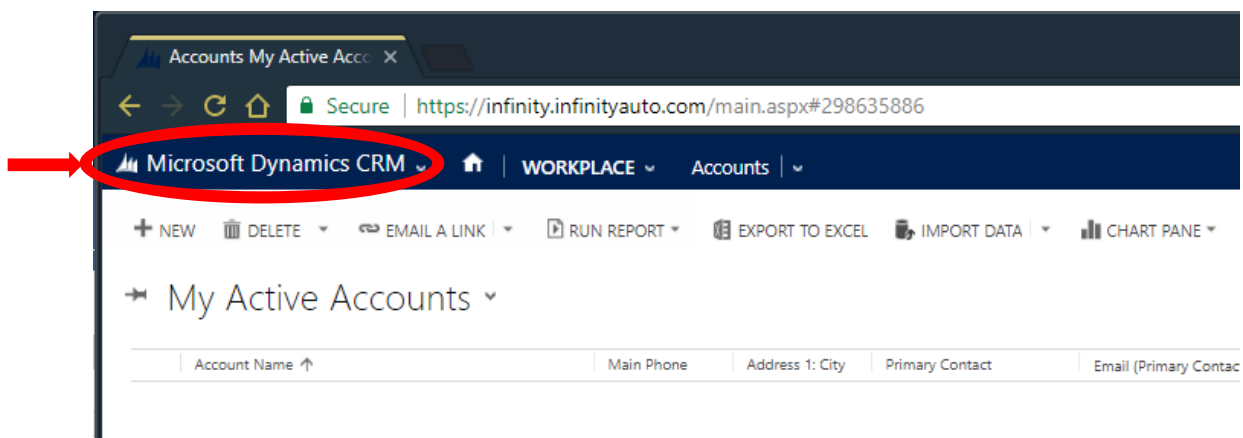
Script: CRM Vertica Files

Solution by: Sergio Nuñez, Amanda De León and Joel Gutierrez

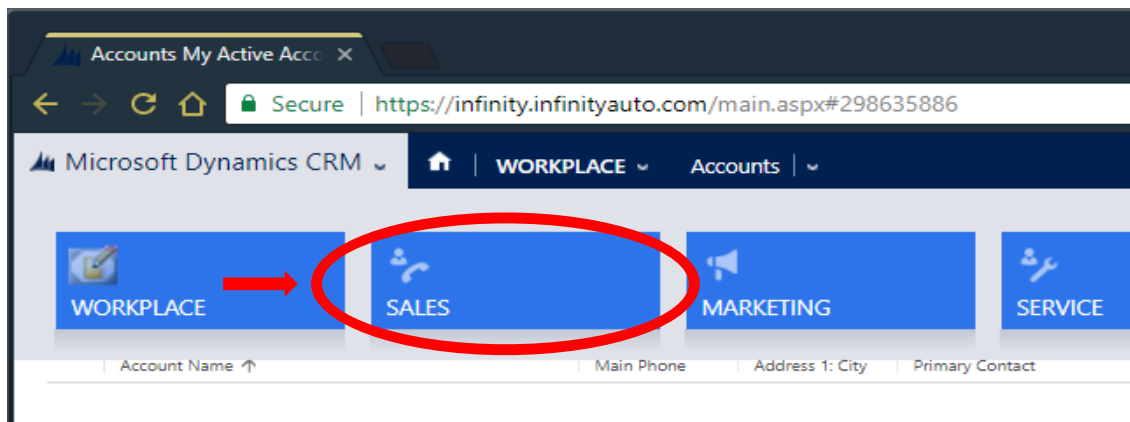
The script will be automated every Monday and/or when requested. It will log in *infinity.infinityauto.com* with the credentials of an Infinity Employee (currently using the Interns' logins).



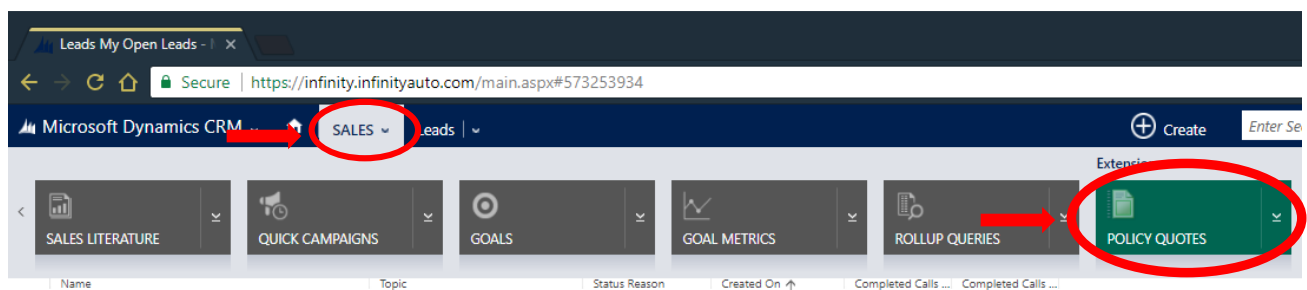
Once logged in, the cursor will click on *Microsoft Dynamics CRM* in the top left-hand corner.



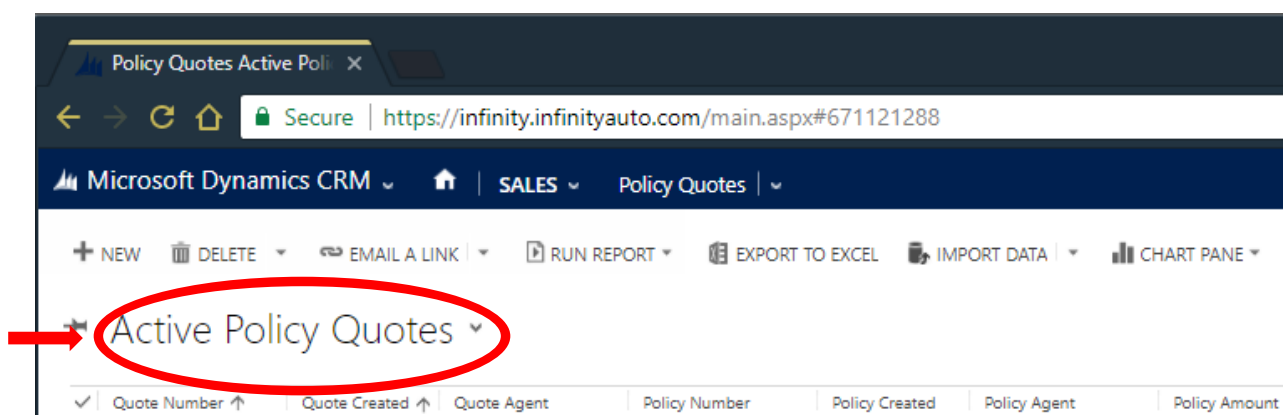
Once done, the script will have the cursor hover over *Microsoft Dynamics CRM* and the option *SALES* will be available for selection.



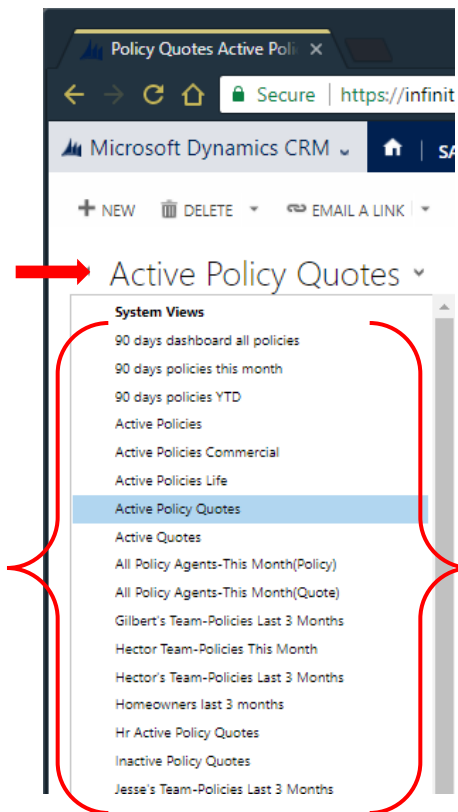
Then the cursor will click on *SALES* (located to the right of *Microsoft Dynamics CRM*) and go through all options until *Policy Quotes* is found.



When *POLICY QUOTES* is selected, the display page *Active Policy Quotes* will appear. The cursor will move and click on *Active Policy Quotes*.



A *System Views* drop down list will be displayed after this action.

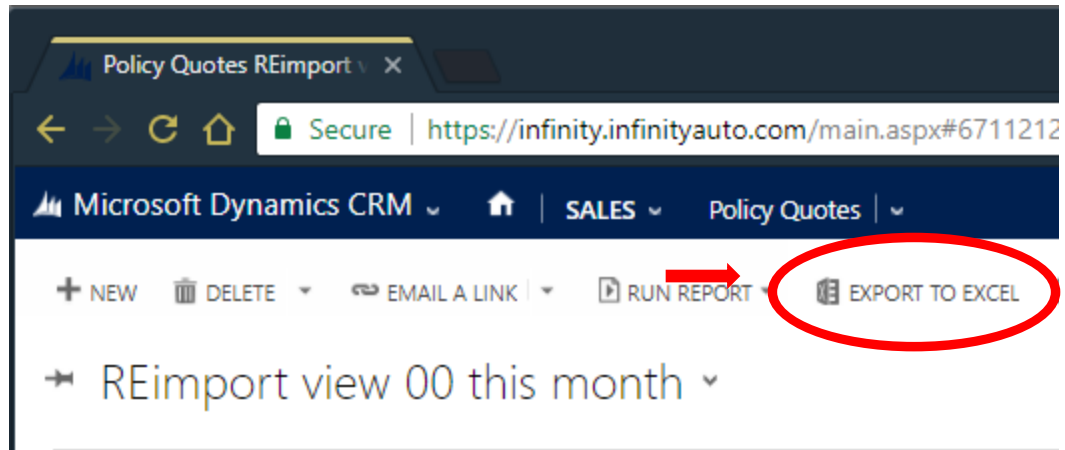


At this point, the script will follow "a set of instructions" where it goes through each *System Views* drop down list option but only selects and downloads the content if it has the label "REimport."

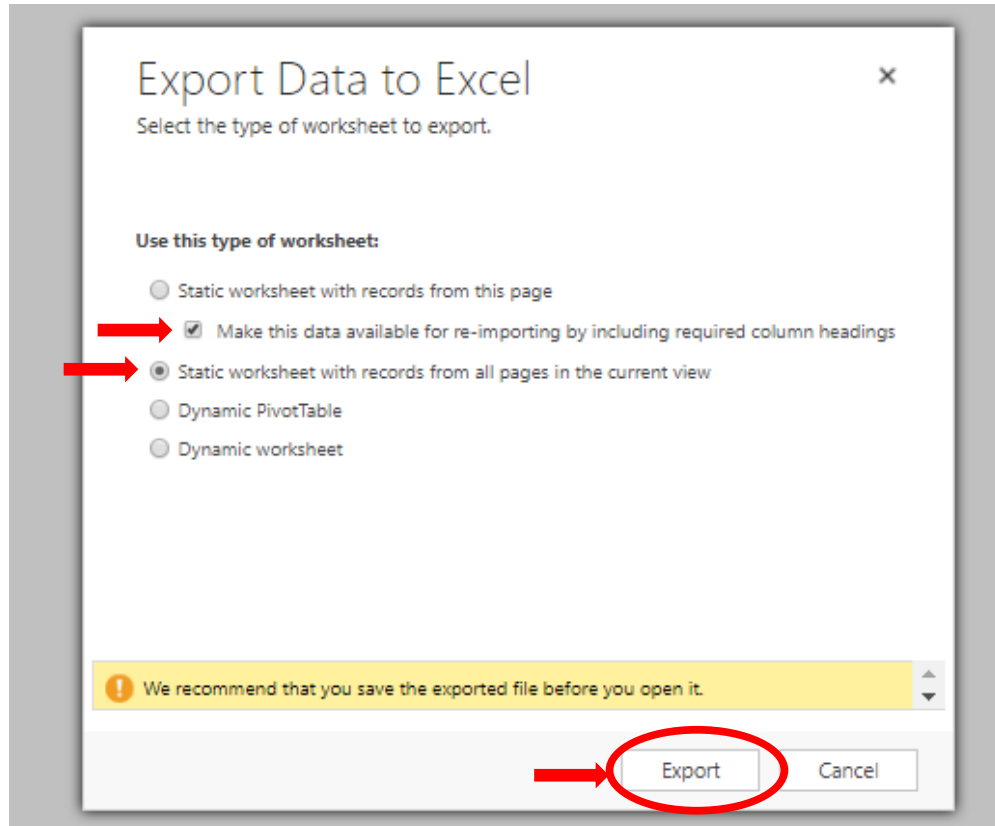
```
# Get the list with reported data
# This part involved creating two separate lists, one for the original list and one with a duplicated list,
# the duplicated list is the one where we'll be storing our REimport views to download.
driver.switch_to.frame("contentIFrame0")
time.sleep(5)
driver.find_element_by_xpath("//*[@id='crmGrid_SavedNewQuerySelector']/span[2]").click()
time.sleep(5)
list = driver.find_element_by_xpath("//ul[@class='ms-crm-VS-Menu']")
sublist = list.find_elements_by_tag_name("li")
reImports = []
for index in sublist:
    if "REimport" in index.text:
        reImports.append(index)

# Each REimport view has an index so I iterated through each index to download the view.
# This contained multiple HTML frames to switch from to download the requested views.
for index in reImports:
    print("%s" % index.text, end=" ")
    index.click()
    driver.switch_to.default_content()
    driver.find_element_by_xpath("//*[@id='netics_policyquote.NoRelationship.HomePageGrid|Macrm.HomepageGrid.netics_policyquote.ExportToExcel']/span/a").click()
    time.sleep(4)
    driver.switch_to.frame("InlineDialog_Iframe")
    driver.find_element_by_xpath("//*[@id='chkReimport']").click()
    driver.find_element_by_xpath("//*[@id='printAll']").click()
    driver.find_element_by_xpath("//*[@id='dialogOkButton']").click()
    time.sleep(10)
    print("Downloaded")
    driver.switch_to.frame("contentIFrame0")
    driver.find_element_by_xpath("//*[@id='crmGrid_SavedNewQuerySelector']/span[2]").click()
```

For each file requested, they will be formatted and exported to Excel by having the cursor select *EXPORT TO EXCEL* located at the top.



Once done, the cursor will select *"Make this data available for re-importing by including required column headings"* and *"Static worksheet with records from all pages in the current view."* The cursor will done select *"Export"* to finish.



There is a timer within the script that allows enough time for each file to be downloaded, once all *"Reimport"* has been downloaded the browser will close after 3 minutes and the script will end.