

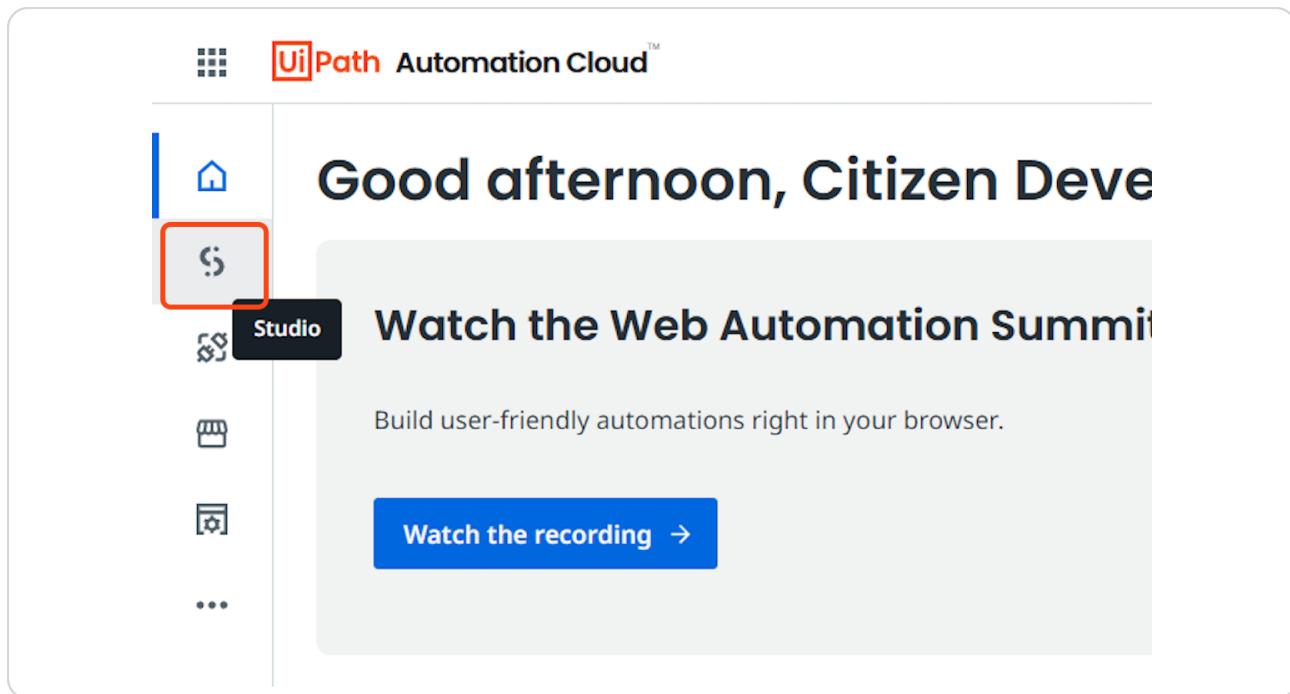
Configure your first automation: Step-by-Step Instructions

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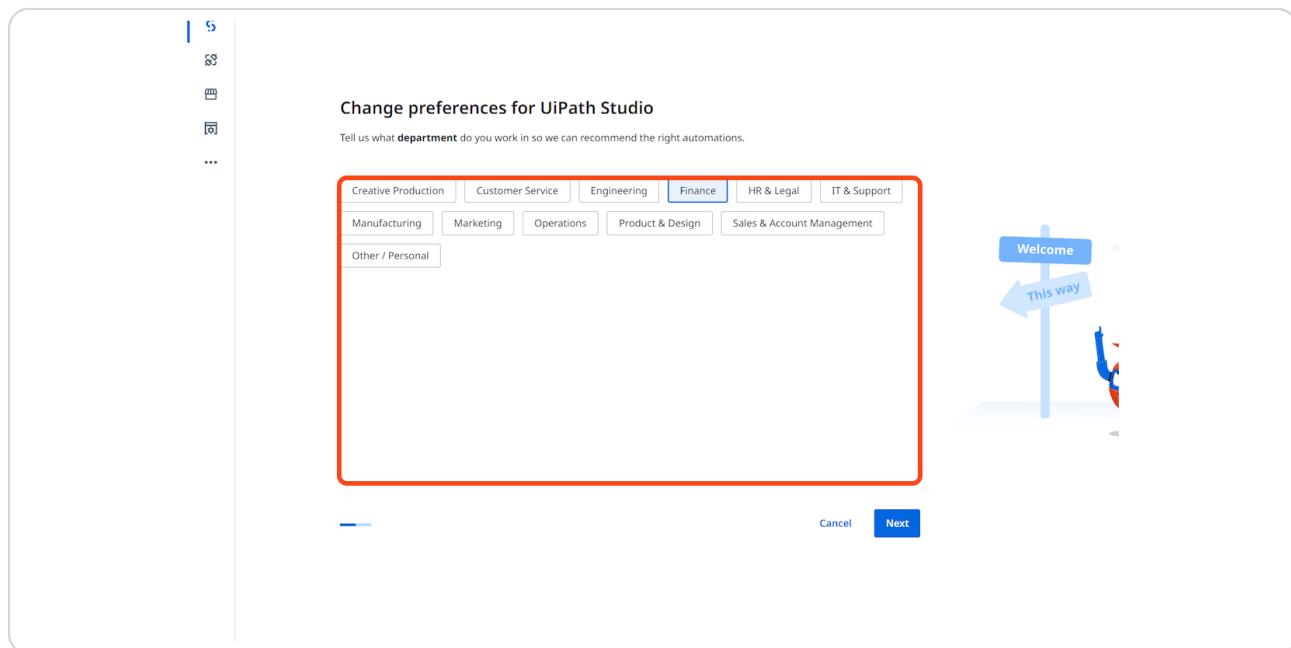
STEP 1

Then, from the left hand menu, select Studio.



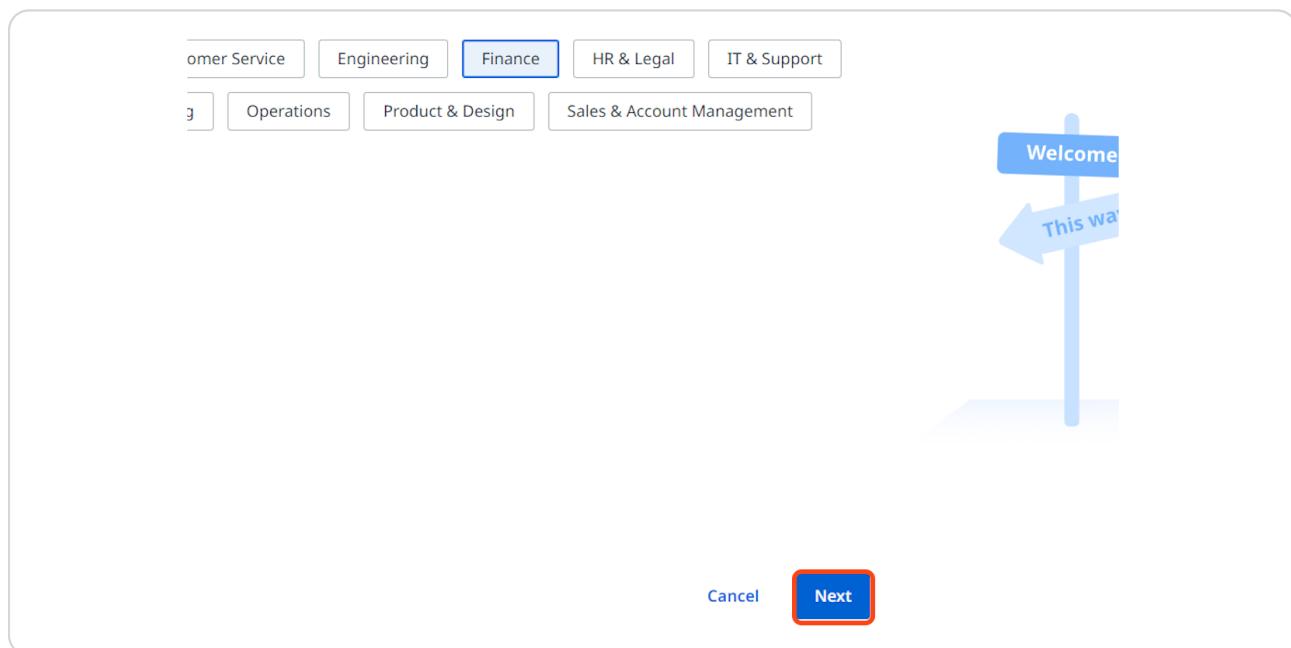
STEP 2

Choose your most appropriate work department to view the recommended pre-built automations.



STEP 3

Click on Next.



STEP 4

Select the third-party services you typically use at work. This will allow you to view the recommended pre-built automations.

A screenshot of a user interface for selecting third-party services. The screen shows a grid of service icons in three rows. Row 1: Cisco Webex..., Citrix ShareFile, Concur, Confluence Cloud, ConstantCor, Coupa, DocuSign, Dropbox. Row 2: Dropbox Business, Epic FHIR R4, Expensify, Freshservice, GitHub, Gmail, Google Cloud..., Google Docs. Row 3: Google Drive, Google Sheets, Google Vertex, Google Vision, GoToWebina, Hootsuite, HubSpot CRM, HubSpot Marketing. Below the grid are 'Back' and 'Update' buttons. A horizontal red bar highlights the first five services in each row.

STEP 5

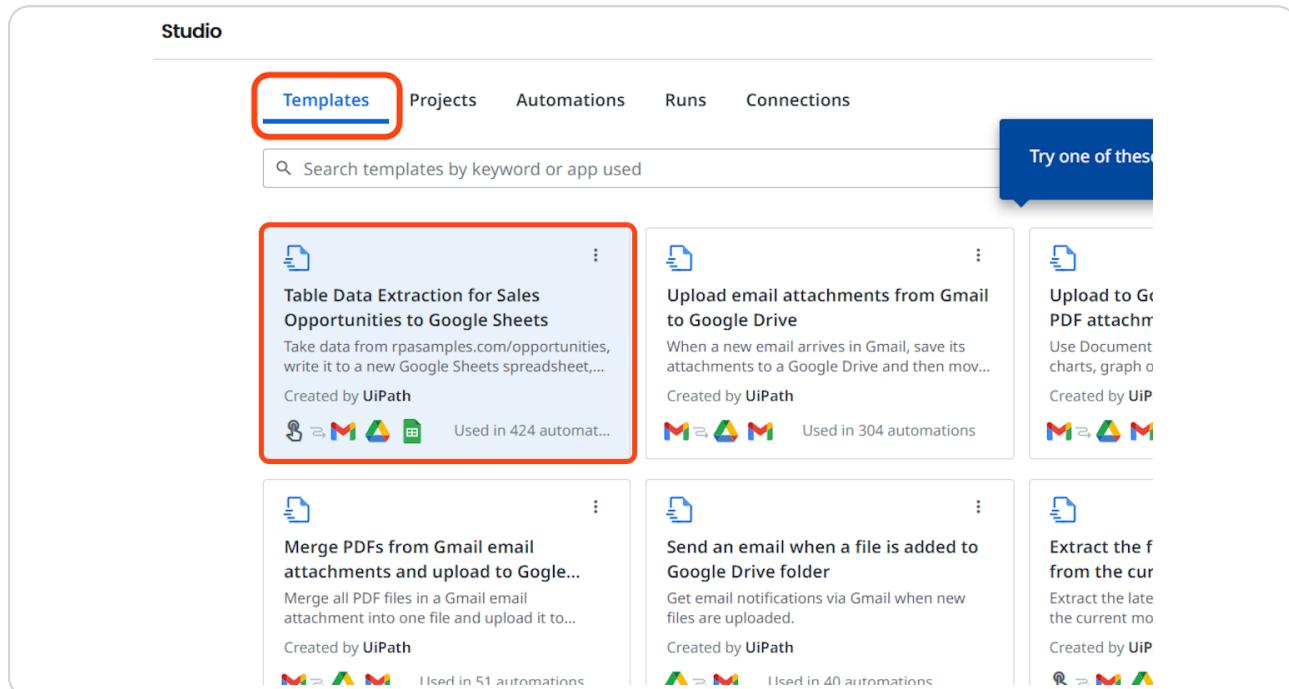
Click on Update to save your preferences.

A screenshot of the same user interface after preferences have been updated. The grid now shows a subset of services: Row 1: Freshservice, GitHub, Gmail, Google Cloud..., Google Docs. Row 2: Google Vision, GoToWebina, Hootsuite, HubSpot CRM, HubSpot Marketing. To the right of the grid is a cartoon character pointing left with a blue arrow labeled "This way". Below the grid are 'Back' and 'Update' buttons. The 'Update' button is highlighted with a red border.

i For the next step, if you are a Microsoft Office user, select the Office-compatible template titled "[Table Data Extraction for Sales Opportunities to Excel Workbook](#)" instead. Don't worry, the steps for using the Office-compatible template are **exactly the same!**

STEP 6

Click on Templates. Then select the "Table Data Extraction for Sales Opportunities to Google Sheets" template.

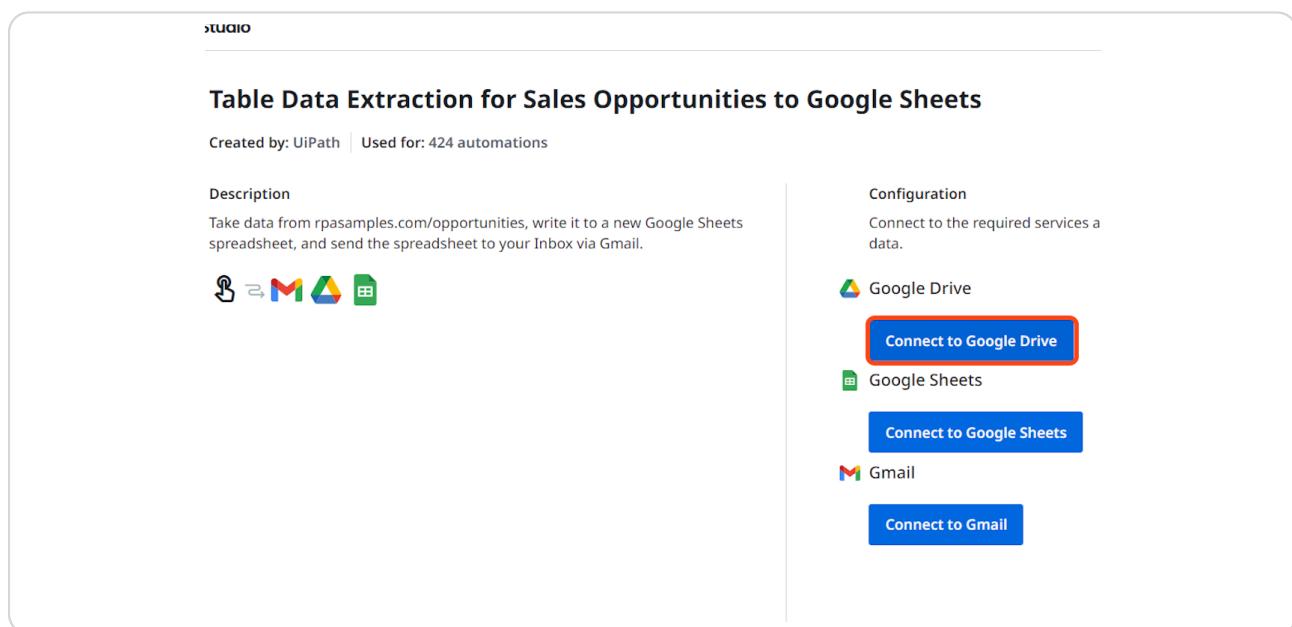


The screenshot shows the UiPath Studio interface with the 'Studio' tab selected. The 'Templates' tab is highlighted with a red box. Below it, there's a search bar and a blue button labeled 'Try one of these'. Several template cards are displayed in a grid:

- Table Data Extraction for Sales Opportunities to Google Sheets**: This card is highlighted with a red box. It describes taking data from rpasamples.com/opportunities and writing it to a new Google Sheets spreadsheet. It was created by UiPath and is used in 424 automations. Icons for Gmail, Google Sheets, and Google Drive are shown.
- Upload email attachments from Gmail to Google Drive**: When a new email arrives in Gmail, its attachments are saved to a Google Drive folder. Created by UiPath, used in 304 automations. Icons for Gmail and Google Drive are shown.
- Upload to Google PDF attachments**: Use Document charts, graphs, or tables to upload PDF attachments. Created by UiPath, used in 0 automations. Icons for Gmail, Google Sheets, and Google Drive are shown.
- Merge PDFs from Gmail email attachments and upload to Google Drive**: Merges all PDF files in a Gmail email attachment into one file and uploads it to Google Drive. Created by UiPath, used in 51 automations. Icons for Gmail, Google Sheets, and Google Drive are shown.
- Send an email when a file is added to Google Drive folder**: Gets email notifications via Gmail when new files are uploaded to a Google Drive folder. Created by UiPath, used in 40 automations. Icons for Gmail and Google Drive are shown.
- Extract the latest file from the current folder**: Extracts the latest file from the current folder. Created by UiPath, used in 0 automations. Icons for Gmail, Google Sheets, and Google Drive are shown.

STEP 7

To set up an automation with this template, you'll need to create a few connections. Click on Connect to Google Drive.



studio

Table Data Extraction for Sales Opportunities to Google Sheets

Created by: UiPath | Used for: 424 automations

Description

Take data from rpasamples.com/opportunities, write it to a new Google Sheets spreadsheet, and send the spreadsheet to your Inbox via Gmail.

Configuration

Connect to the required services and data.

Google Drive

Connect to Google Drive

Google Sheets

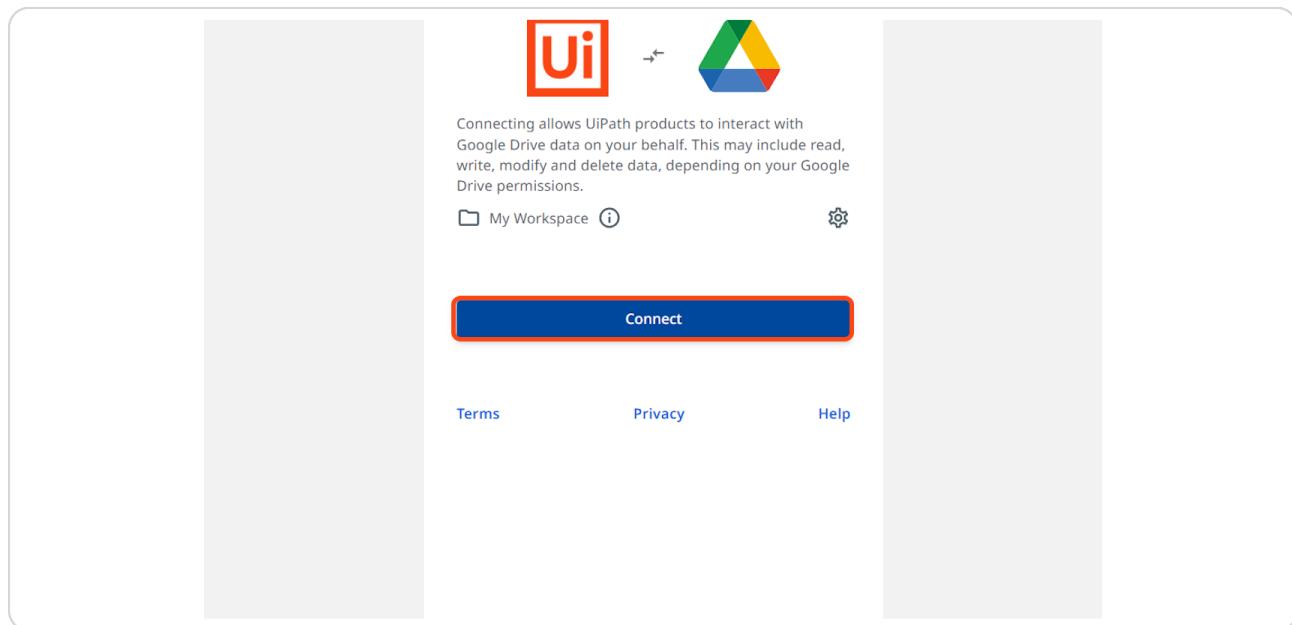
Connect to Google Sheets

Gmail

Connect to Gmail

STEP 8

Click on Connect.



Connecting allows UiPath products to interact with Google Drive data on your behalf. This may include read, write, modify and delete data, depending on your Google Drive permissions.

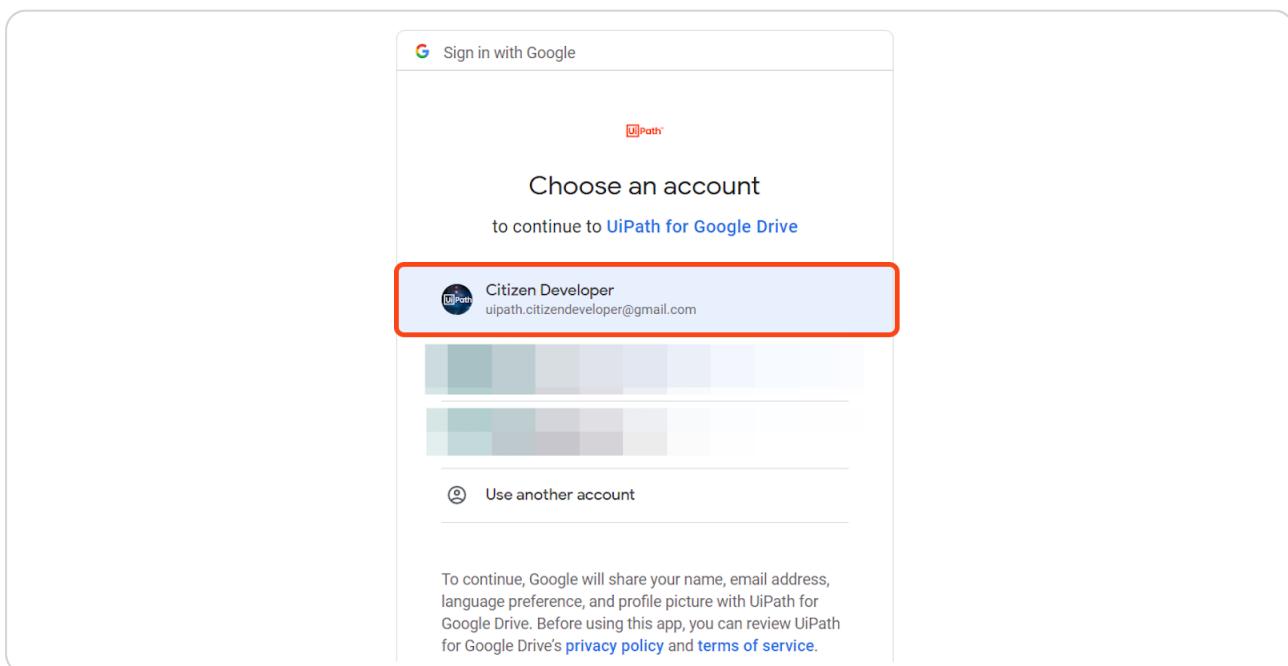
My Workspace *i*

Connect

Terms Privacy Help

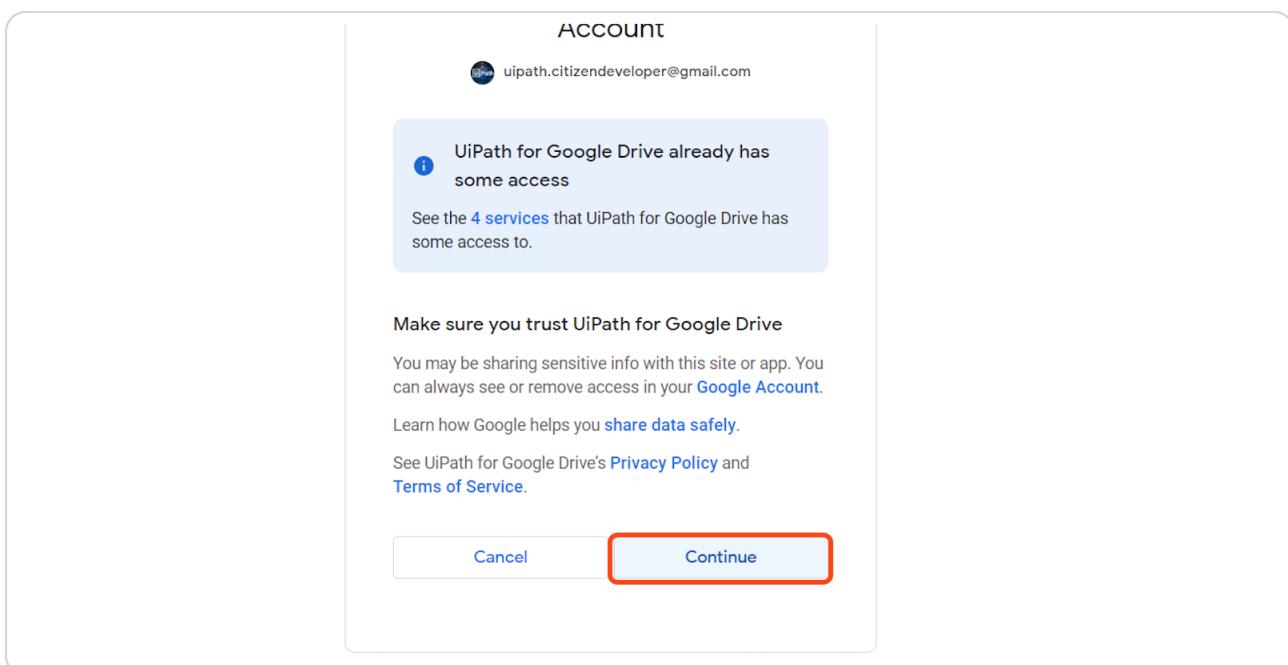
STEP 9

Select your Gmail address to proceed.



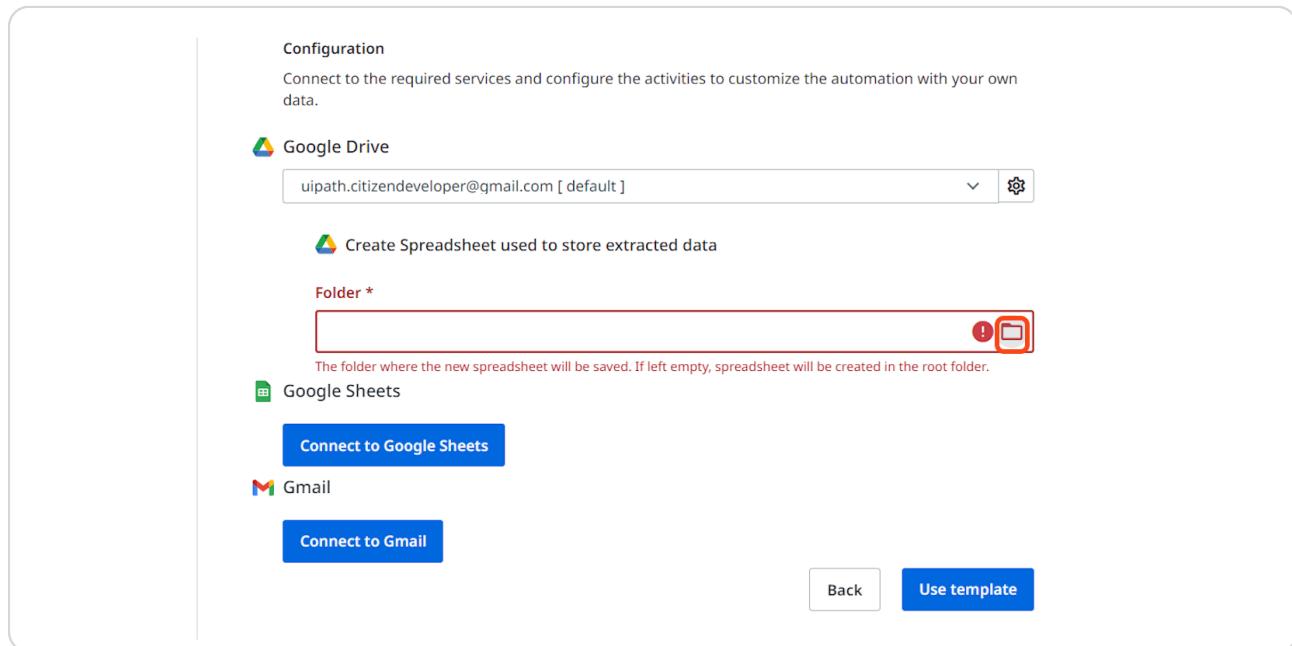
STEP 10

[Click on Continue.](#)



STEP 11

The connection has been established and now it's time to indicate the location where the spreadsheet will be saved. Click on Folder.



Configuration

Connect to the required services and configure the activities to customize the automation with your own data.

Google Drive
uipath.citizendeveloper@gmail.com [default]

Create Spreadsheet used to store extracted data

Folder *

The folder where the new spreadsheet will be saved. If left empty, spreadsheet will be created in the root folder.

Google Sheets

Connect to Google Sheets

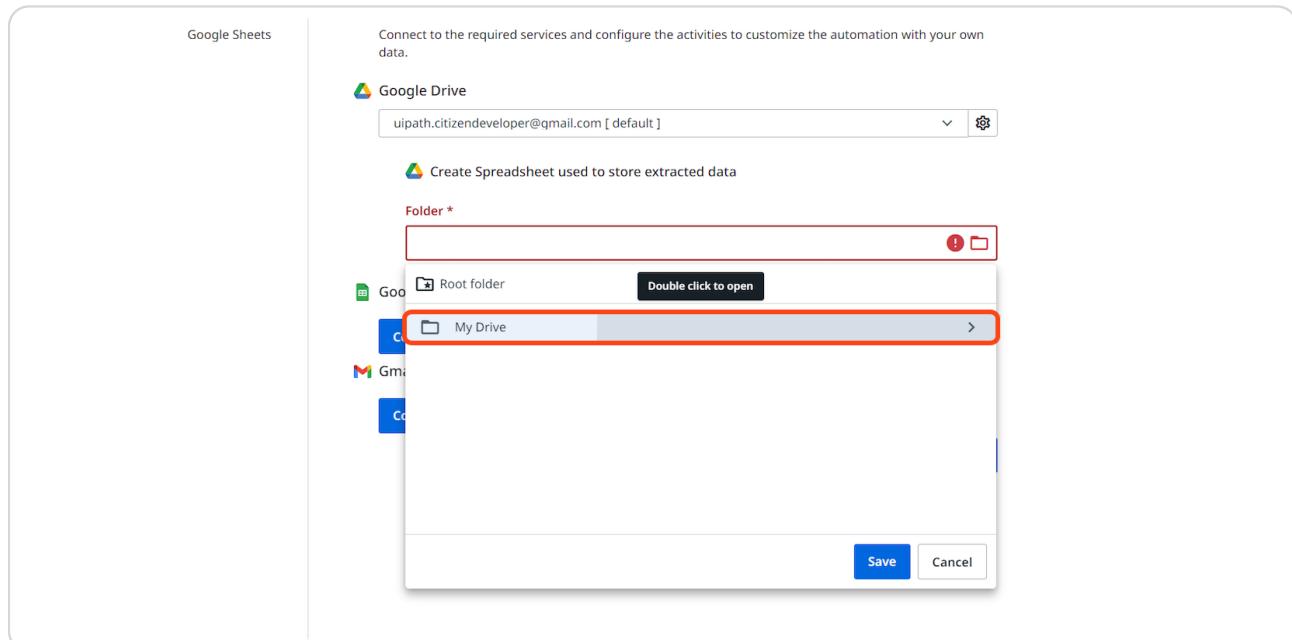
Gmail

Connect to Gmail

Back **Use template**

STEP 12

Choose the Root folder.



Google Sheets

Connect to the required services and configure the activities to customize the automation with your own data.

Google Drive
uipath.citizendeveloper@gmail.com [default]

Create Spreadsheet used to store extracted data

Folder *

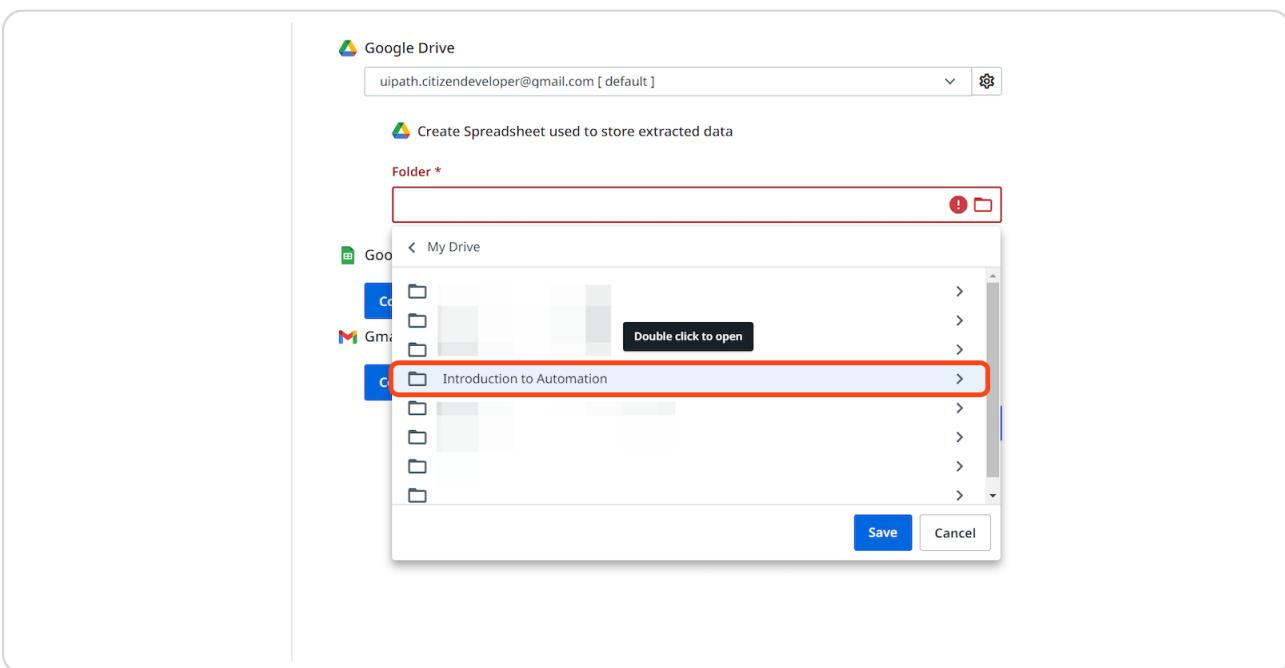
Root folder
Double click to open

My Drive

Save **Cancel**

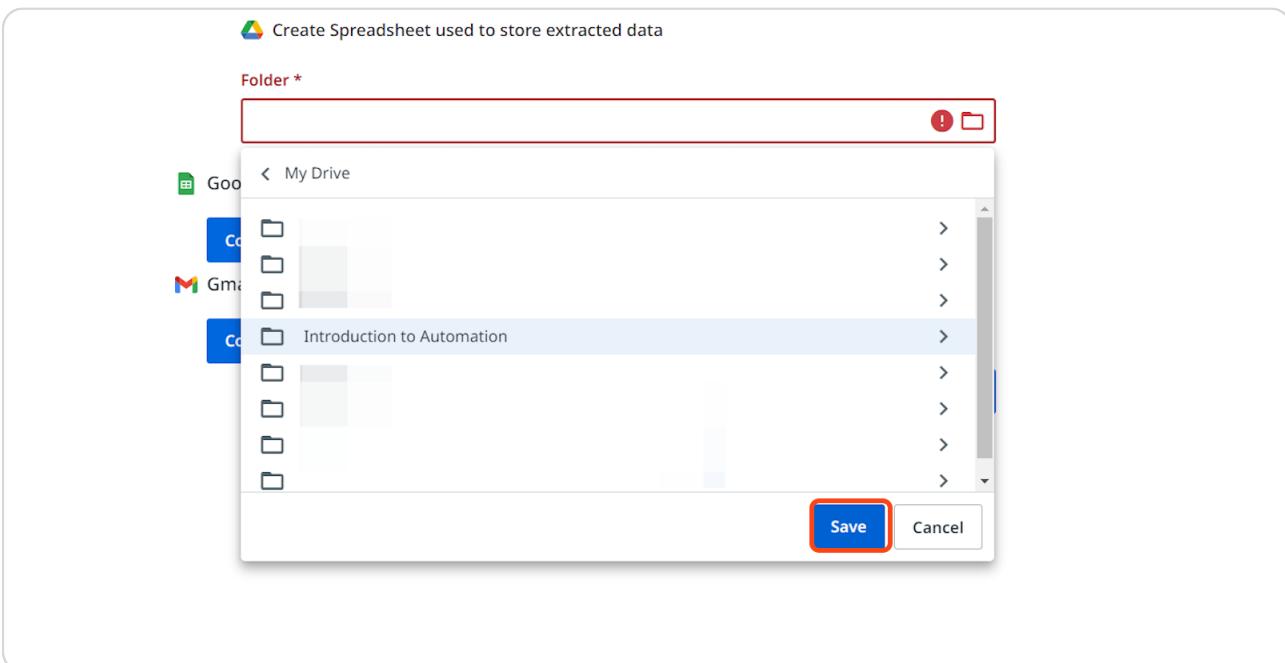
STEP 13

And finally the folder where the spreadsheet will be saved.



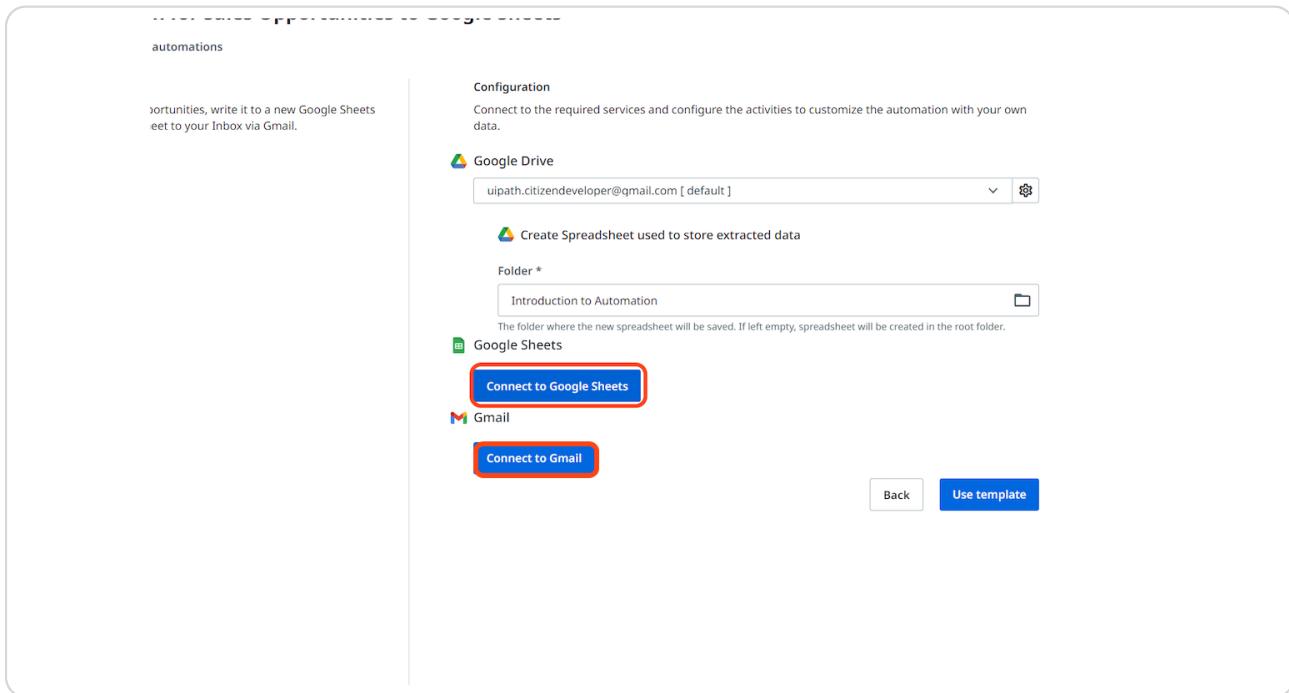
STEP 14

Click on Save.



STEP 15

To continue, you need to establish connections for the other 2 applications. Click on "Connect to Google Sheets" to set up the second connection for the automation to run properly. Proceed in the same manner for the third connection.



STEP 16

When all the required connections are established, proceed by clicking on "Use Template".

Configuration
Connect to the required services and configure the activities to customize the automation with your own data.

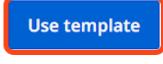
 Google Drive
uipath.citizendeveloper@gmail.com [default] 

 Create Spreadsheet used to store extracted data

Folder *
Introduction to Automation 
The folder where the new spreadsheet will be saved. If left empty, spreadsheet will be created in the root folder.

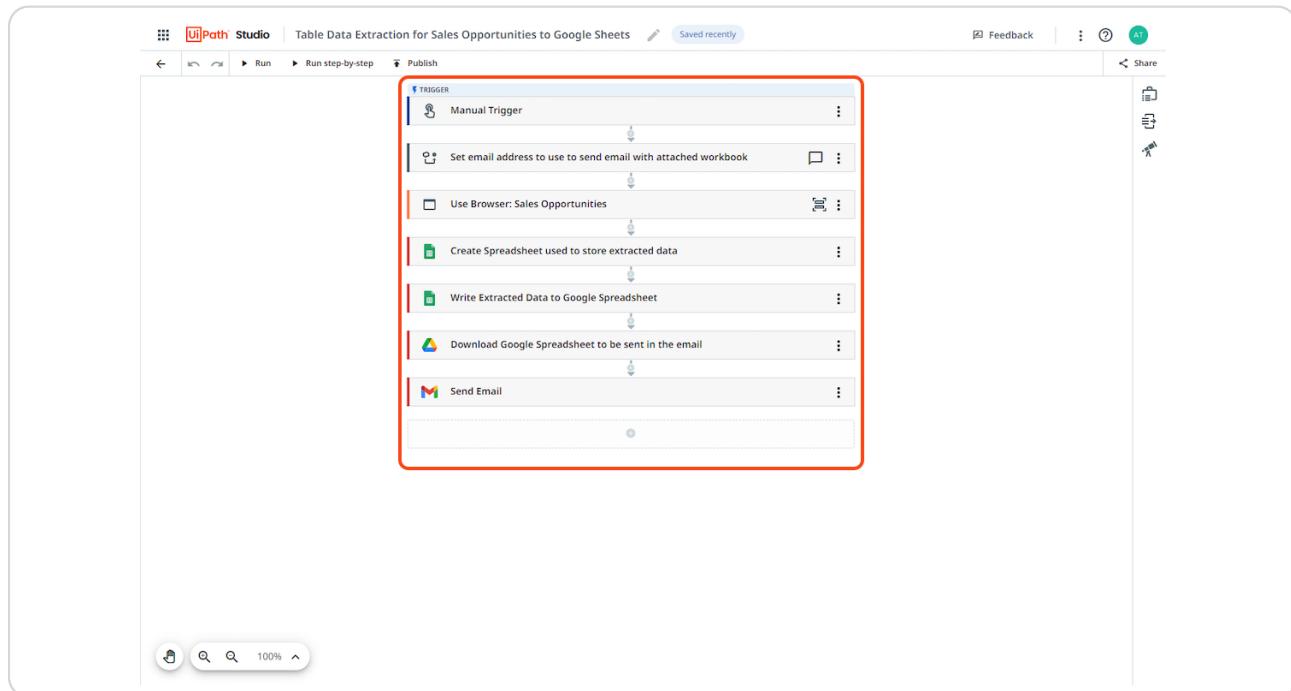
 Google Sheets
uipath.citizendeveloper@gmail.com [default] 

 Gmail
uipath.citizendeveloper@gmail.com [default] 

[Back](#) **Use template** 

STEP 17

The "Table Data Extraction for Sales Opportunities to Google Sheets" template starts with a manual trigger, followed by a series of activities that include setting up an email address, using a browser, interacting with Excel files, and ultimately sending the results via email.



STEP 18

Before continuing, let's review several key concepts:

Workflows: A **workflow** is a series of steps designed to complete a specific task or process.

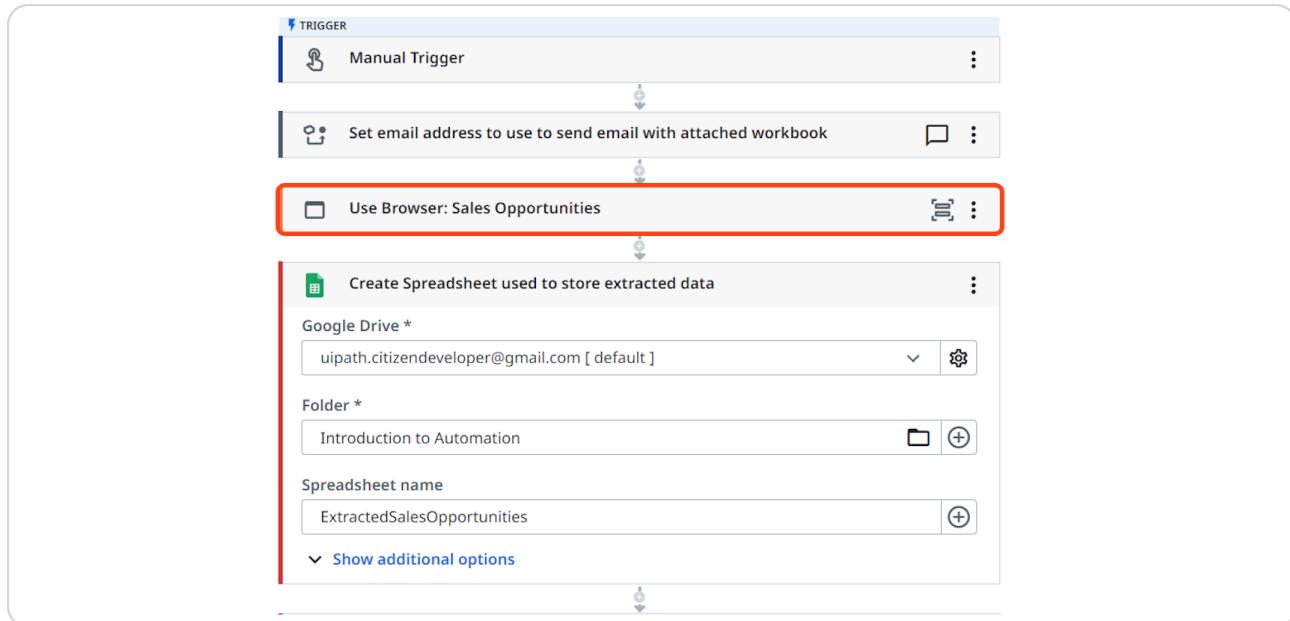
In Studio Web, a workflow is comprised of several building blocks called activities. These are executed in a sequential manner, forming an end-to-end process. Each activity represents an individual action or operation carried out by a robot, such as interacting with an application, processing data, or performing calculations.

Triggers: A **trigger** is an initiating event that sets the workflow in motion.

In Studio Web, there are three types of triggers available: manual, scheduled, and event-based. A manual trigger requires user intervention to start the execution; scheduled triggers run at specified times; and event-based triggers launch in response to specific events.

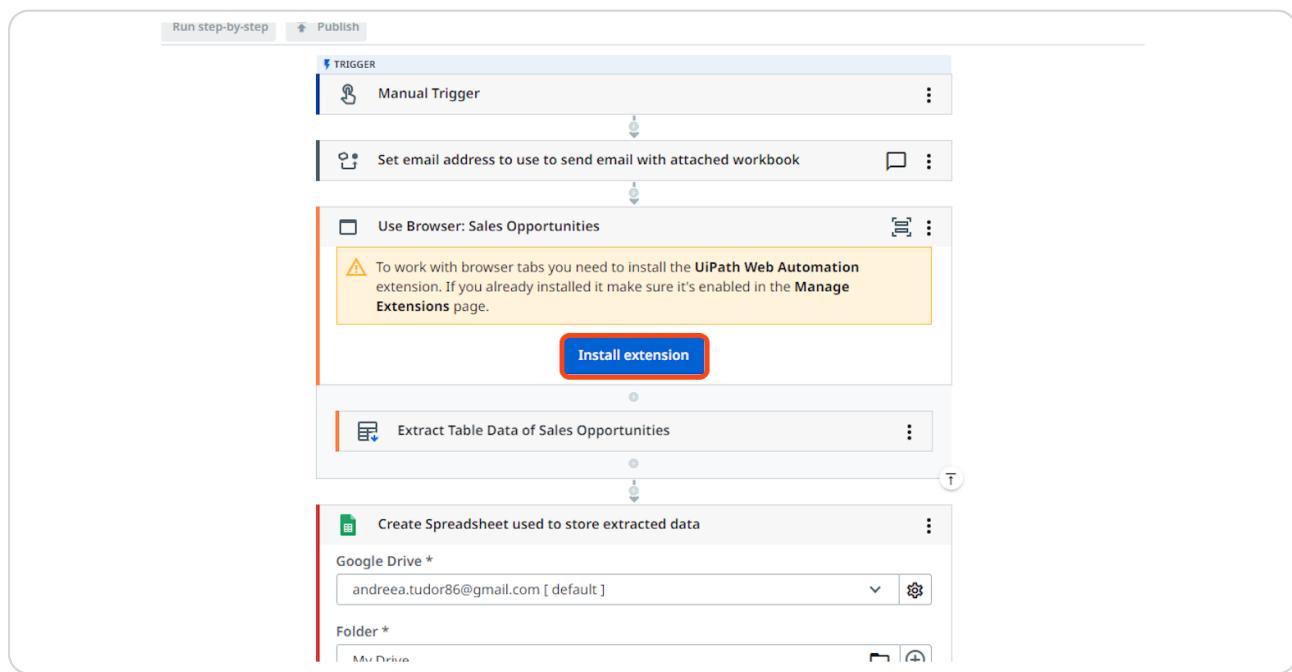
STEP 19

Click on Use Browser: Sales Opportunities. To be able to work with browser tabs, you need to install a UiPath Studio Web extension.



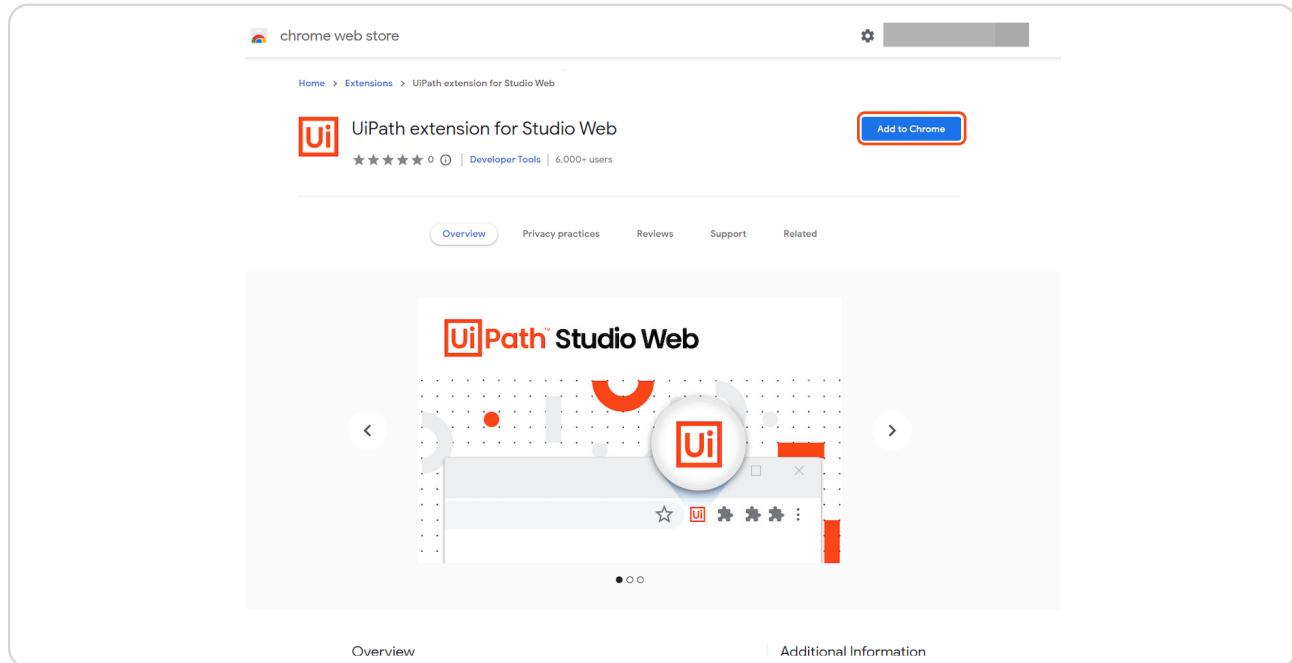
STEP 20

Click on Install Extension.



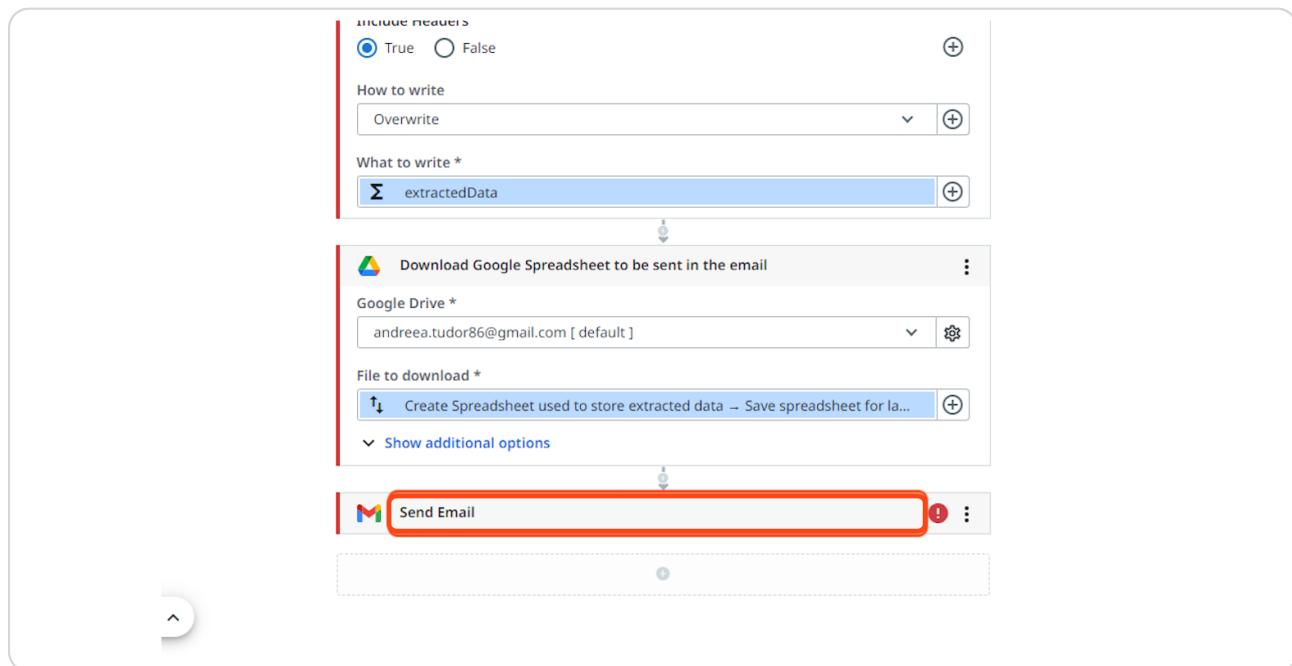
STEP 21

Add the extension to Chrome or your preferred web browser.



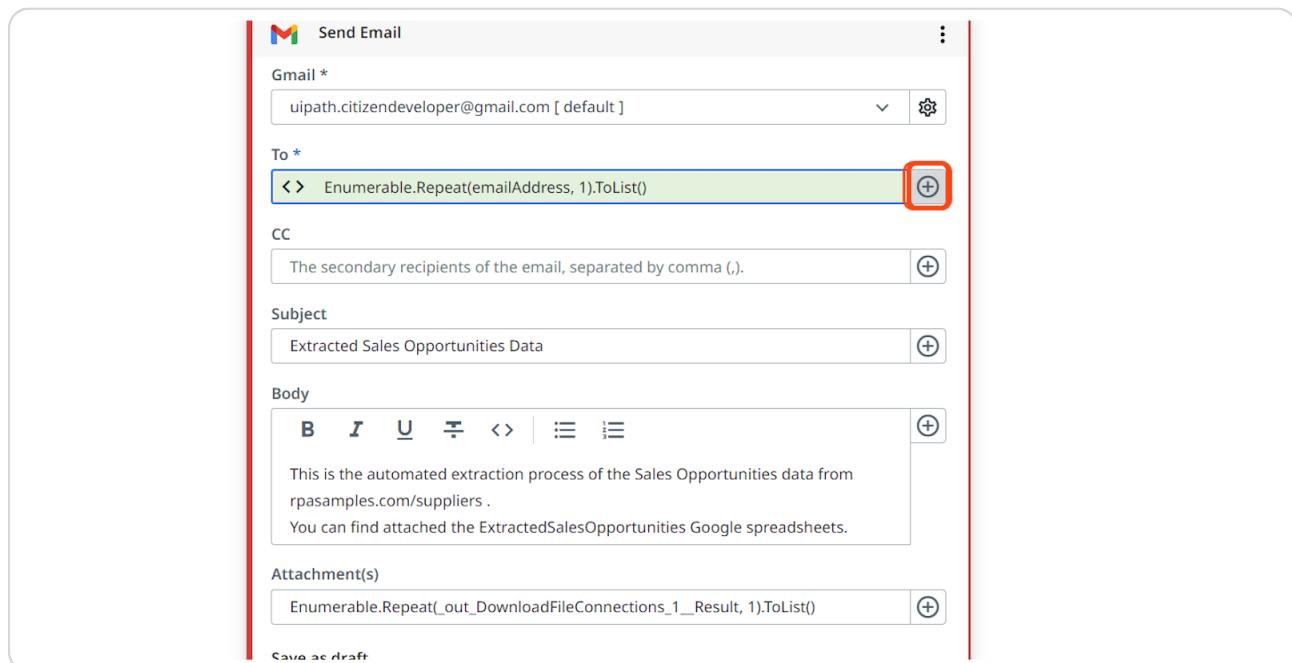
STEP 22

Click on Send Email to configure the sender email address.



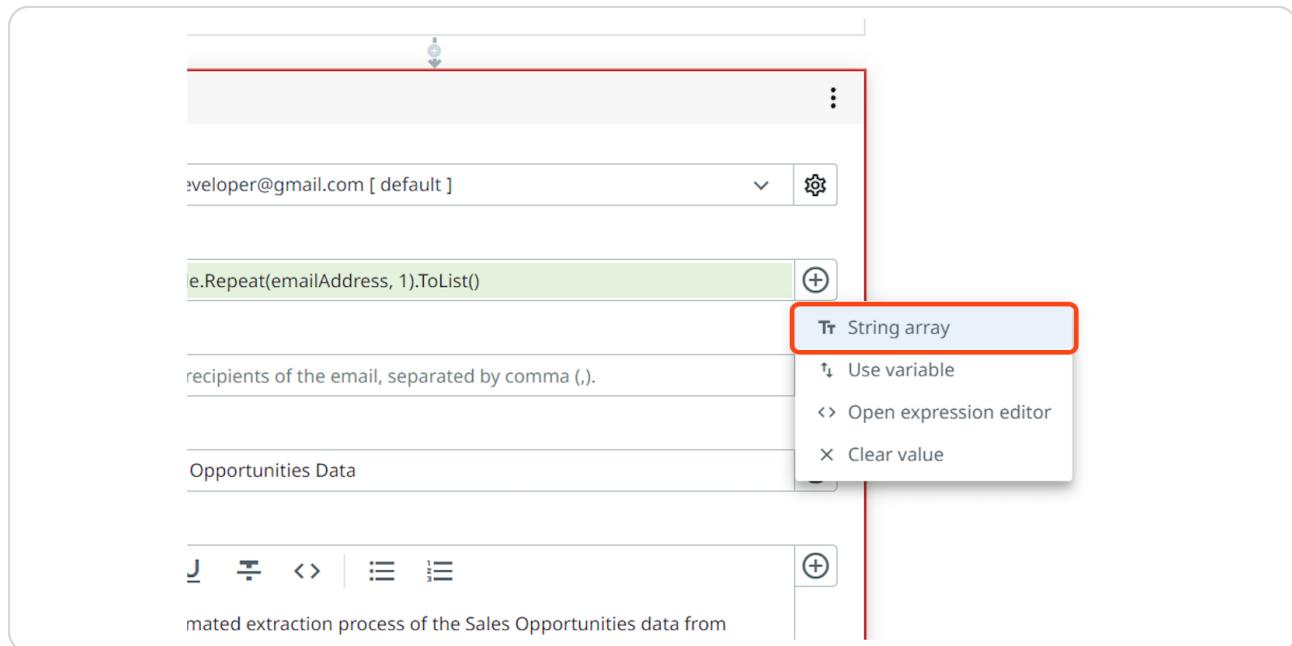
STEP 23

Click on the plus icon on the right.



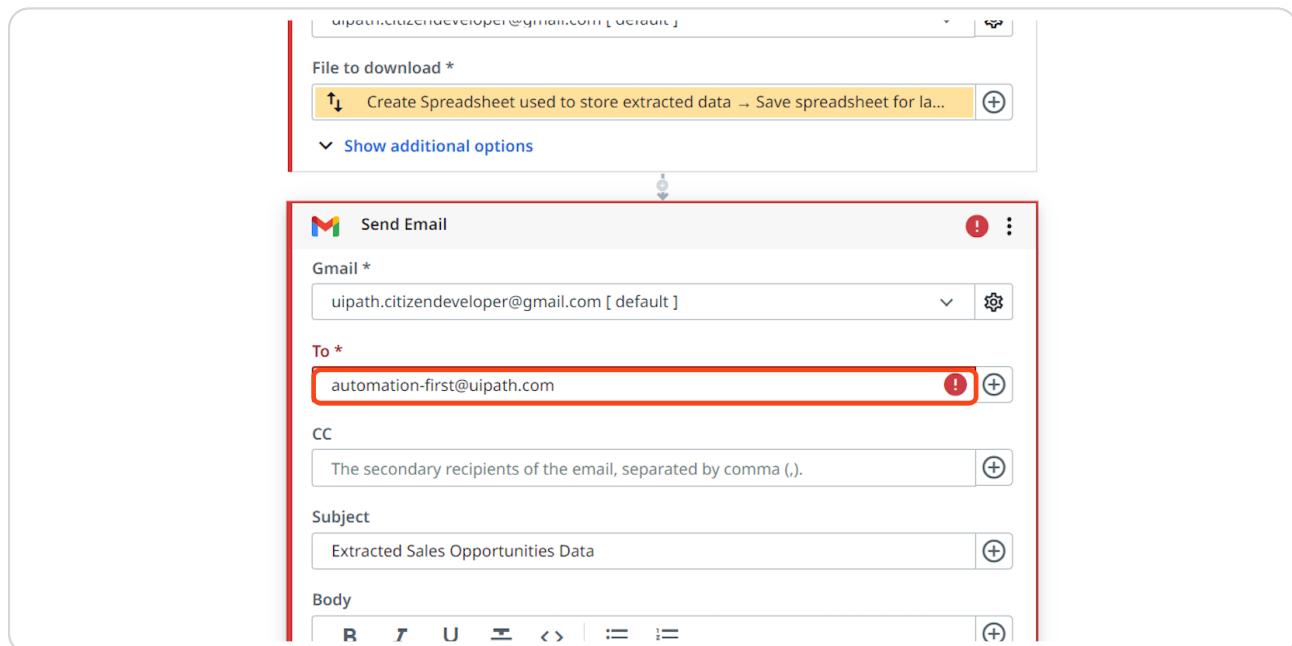
STEP 24

To configure an email address within an automation, you need to select the "string array" option, which is a text editor.



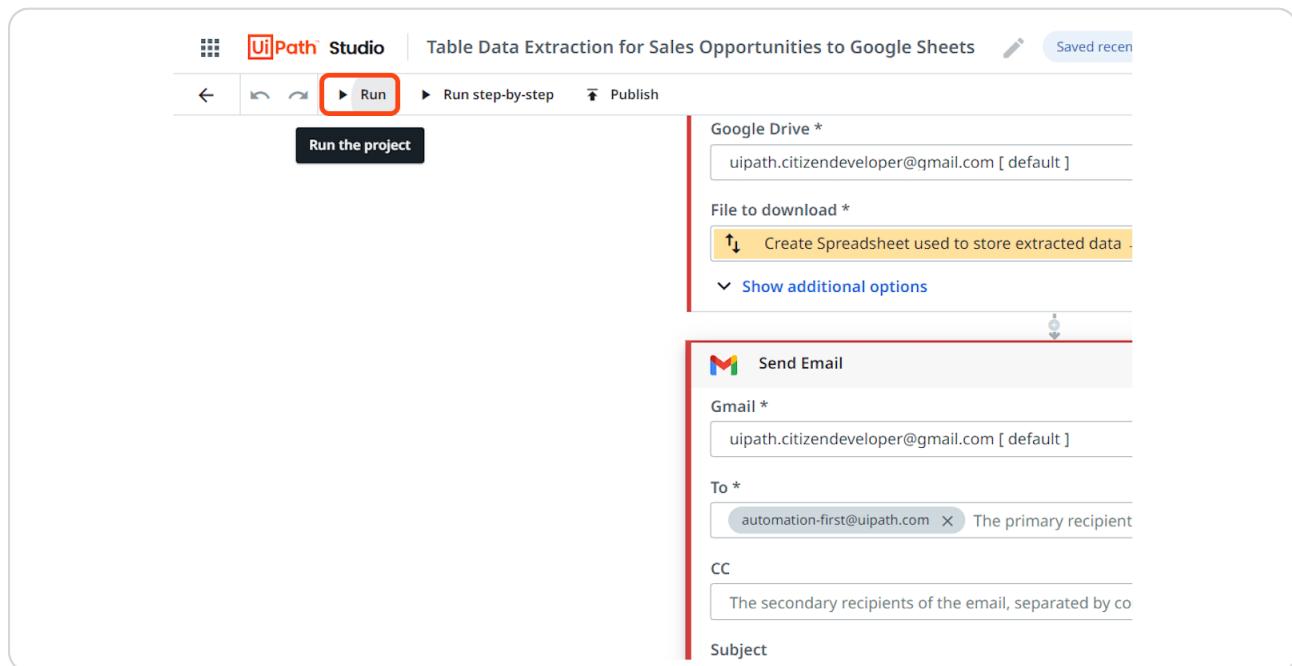
STEP 25

Type in the following email address "automation-first@uipath.com".



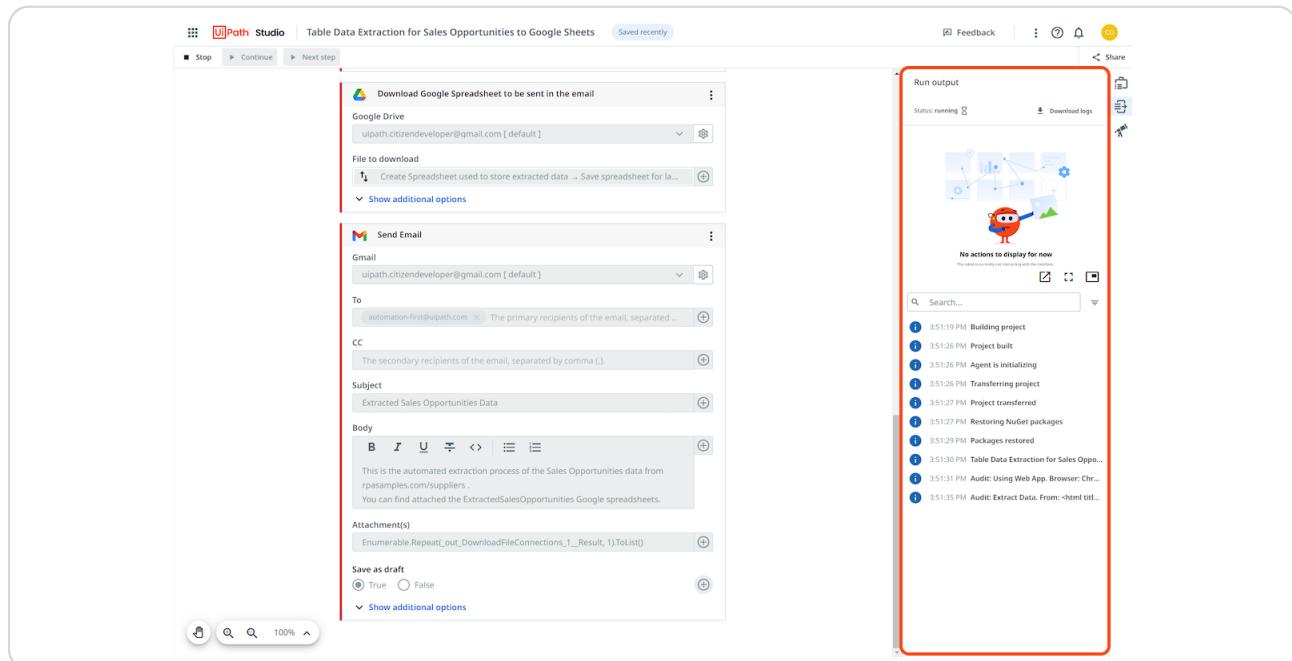
STEP 26

Great! Everything is set. To start the automation, click on Run.



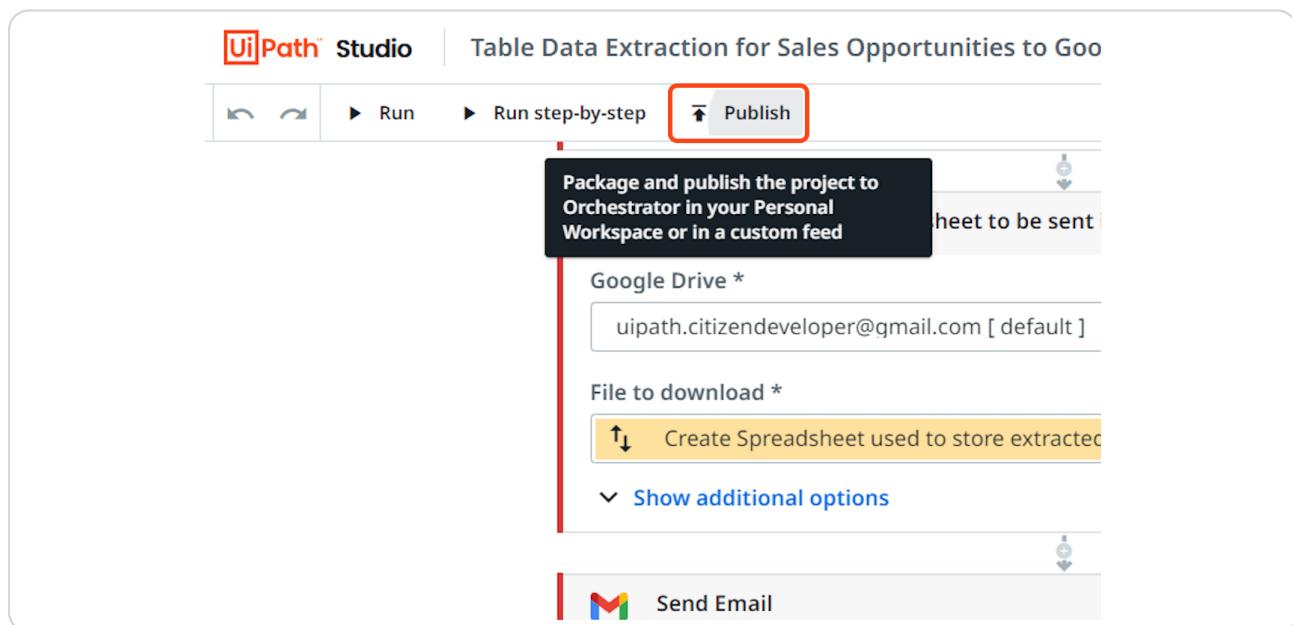
STEP 27

Watch it unfold in the run panel on the right.



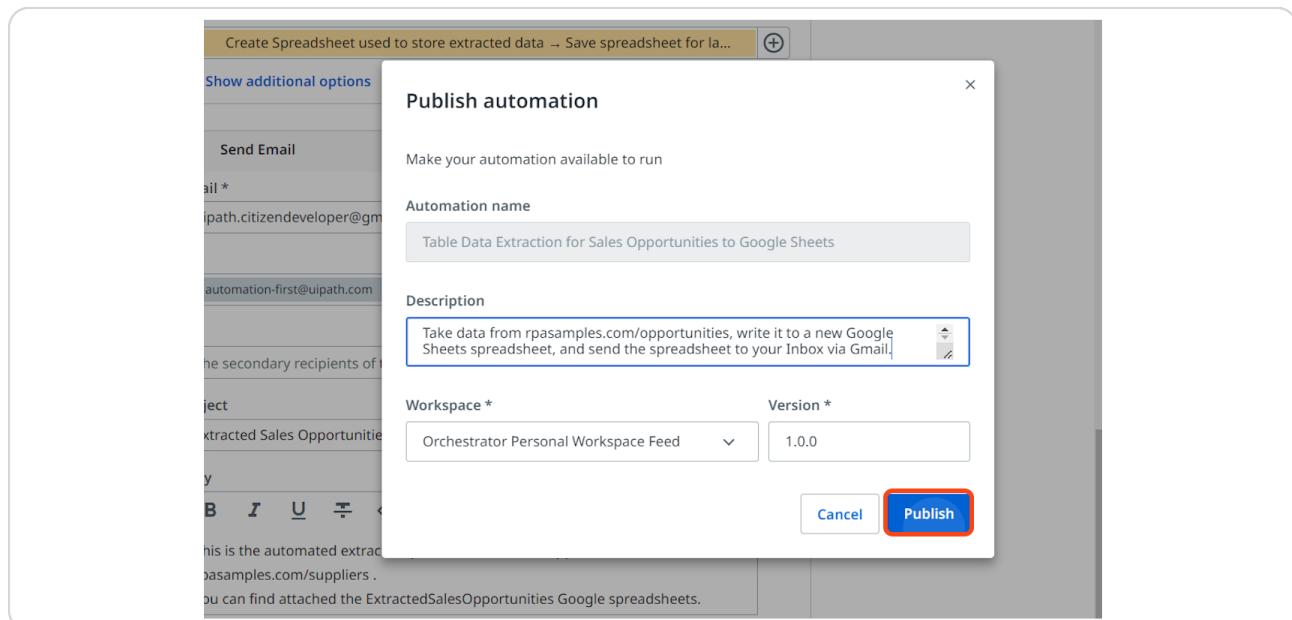
STEP 28

Click on the Publish tab. Publish the automation so that you can always have it at hand.



STEP 29

An overview of the automation will appear. Click on Publish.



STEP 30

Now, check if you have it in the Automations tab. Click on Automations.

The screenshot shows the UiPath StudioX application window. At the top, there is a navigation bar with tabs: 'Templates' (underlined in blue), 'Projects', 'Automations' (which is highlighted with a red box), 'Runs', and 'Connections'. Below the navigation bar is a search bar with the placeholder text 'Search templates by keyword or app used'. The main area displays two automation templates as cards:

- Table Data Extraction for Sales Opportunities to Google Sheets**
Take data from rpasamples.com/opportunities, write it to a new Google Sheets spreadsheet,...
Created by UiPath
Used in 425 automati...
- Upload email attachments from Gmail to Google Drive**
When a new email arrives in Gmail, save attachments to a Google Drive and then i...
Created by UiPath
Used in 304 automati...

STEP 31

There it is! To start it again, click on Run!

The screenshot shows the 'Connections' tab in the UiPath StudioX application. A single automation item is listed in the table:

Priority	Version	Start
Normal	1.0.0	Run

The 'Run' button is highlighted with a red box.

