1. **Use Excel File** - select file Portfolio.xlsx and Reference as: Portfolio

1.1 **Write Cell** - What to write: click on plus sign, select text and key in "AAPL" (Apple); Where to write: click on plus sign, select Portfolio followed by Indicate in Excel, point towards Sheet2!A1

1.2 **Write Cell** - Repeat above with "MSFT" (Microsoft) and Indicate in Excel (Portfolio), Sheet2!B1

1.3 **Write Cell** - Repeat above with "ZM" (Zoom) and Indicate in Excel (Portfolio), Sheet2!C1

1.4 **Use Application/Browse**r to connect with Yahoo Finance using Chrome, will need to install the Chrome Extension but should be prompted by UIPath Studio when attempting to connect to Yahoo Finance ("YF"). In YF insure that AAPL (Apple) is selected. In the Use Application/Browser window we will need to (i) indicate the webpage we want to connect with and (ii) what we inded to do (activity) once we land on that page.

1.4.1 Use **Get Text** to point to cell required but will need to anchor, follow instructions from UI. Save to: location required e.g. [Portfolio] Sheet2!A2. To do, click on plus sign, followed by Portfolio then Indicate in Excel location required. See full details in 1.6.1 below.

1.5 **Use Application/Browser** to connect with Yahoo Finance, select MSFT (Microsoft). Save to: location required e.g. [Portfolio] Sheet2!B2. To do, click on plus sign, followed by Portfolio then Indicate in Excel location required. See full details in 1.5.3.

1.51.1 Use **Get Text** to point to cell required. See full details below.

1.6 **Use Application/Browser** to connect with Yahoo Finance, select ZM (Zoom), Indicate application to automate: go to YF webpage with ZM pre-selected earlier, click once on webpage which makes connection and we can see the Browser URL as shown below. Next look for "Get Text" in the search button and drop in the action

1.6.1 **Get Text** requires (i) target on webpage (ii) location to save the information to. Click on Indicate target on screen to point to data required on weabpage which will need to be anchored, followed by Confirm. See below for example. Save to: location required by clicking on plus sign, followed by Portfolio, then Indicate in Excel location required e.g. [Portfolio] Sheet2!C2. Once done, close the Excel to avoid conflicts later.

Machine generated alternative text:



1.7 **Insert Rows** - In what table or range: [Portfolio] Table 1, Number of rows: 1 (Has headers), Where: Start

1.8 **Write Cell** - What to write: =today(), Where to write: [Portfolio] Sheet1!A7

1.9 **Write Cel**l - What to write: [Portfolio] Sheet2!A2, Where to write: [Portfolio] Sheet1!B7

1.10 **Write Cell** - What to write: [Portfolio] Sheet2!B2, Where to write: [Portfolio] Sheet1!C7

1.11 **Write Cel**l - What to write: [Portfolio] Sheet2!C2, Where to write: [Portfolio] Sheet1!D7

1.12 **Write Cell** - What to write: =(B7 - B$2) \* C$2, Where to write: [Portfolio] Sheet1!E7

1.13 **Write Cell** - What to write: =(C7 - B$3) \* C$3, Where to write: [Portfolio] Sheet1!F7

1.14 **Write Cell** - What to write: =(D7 - B$4) \* C$4, Where to write: [Portfolio] Sheet1!G7

1.15 **Write Cell** - What to write: =(E7 + F7 +G7), Where to write: [Portfolio] Sheet1!H7