Inventory Management: Step List

Introduction

This demo will help you to create a task bot that uses the VLOOKUP function, Append worksheet action and Rename worksheet action in the Excel advanced package.

Prerequisite

You need access to the Automation Anywhere Community Edition:
https://community.cloud.automationanywhere.digital

Note: After editing actions, make sure you are click the **Apply** button to apply the changes and **Save** button to save the task bot.

1. Calculate the remaining quantity from the quantity count in the received and Issued worksheet using VLOOKUP function

a. Open the Inventory Excel file
   i. From the Actions panel, drag and drop the **Excel advanced: Open** action to the bot editor.
   ii. In the Action details panel, click **Desktop file** and enter the file path with name.
   iii. Select the **Specific sheet name** field and enter the worksheet name.
   iv. Open the file in **Read-write mode.**
   v. Click **Apply**.

b. Get the total number of rows in the worksheet
   i. From the Actions panel, drag and drop the **Excel advanced: Get number of rows** at the end.
   ii. Select the worksheet by **Index** and specify the number.
   iii. Select **Non-empty rows** radio button.
   iv. In the **Assign to variable** field, create and assign as variable to the output.
   ***Note**: Make sure that the variable is already created with the variable type as **Number**.*
   v. Click **Apply**.

c. Loop through the rows of the Excel file and assign each row to a variable
   i. From the Actions panel, drag and drop the **Loop** action to the bot editor.
   ii. In the Iterator list, select **For each row in worksheet**.
   iii. In the **Loop through** field, select the **Specific rows** option from the drop-down list.
   iv. Enter the required row number in the **from row** value field.
   v. In the **to row** value field, use the **Insert variable** icon to select the **total number of rows-number** variable.
   vi. In the **Assign the current value to this variable** field, create and assign the variable to the output.
   ***Note:** Make sure that the variable is created with the variable type as **Record**.*
   vii. Click **Apply**.

d. Create a count variable and convert it to string
   i. From the Variable panel, create a variable **Count** with the Default value as 2.
   ***Note**: Make sure that the variable is created with the variable type as **Number**.*
   ii. From the Actions panel, drag and drop the **Number: To string** action within the loop action.
   iii. In the **Enter a number** field, assign the count variable to it.
   iv. In the **Enter number of digits after decimal (number format)** field, enter the number of digits after decimal.
   v. In the **Assign the output to variable** field, create and assign the variable to the output.
   ***Note:** Make sure that the variable is created with the variable type as **String**.*
   vi. Click **Apply.**

e. Calculate the remaining quantity from the quantity count in the received and Issued worksheet
   i. From the Actions panel, drag and drop the **Excel advanced: Set cell formula** within the loop action.

ii. In the Action details panel, select the **Specific cell** and specify the column alphabet along with the string count variable.
iii. Enter the VLOOKUP formula to set in the **Enter formula for specific cell** field as VLOOKUP(lookup value, range where the lookup value is located, the column number in the range containing the return value).
iv. Click **Apply**.

f. Retrieve and store the remaining stock quantity as string variable in the worksheet
i. From the Actions panel, drag and drop the **Excel advanced: Get single cell** action to the bot editor.
ii. In the Action details panel, select the **Specific cell** and specify the column alphabet along with the string count variable from where you want to pick the value.
iii. In the **Store cell contents to** field, create and assign the variable to the output.
Note: *Make sure that the variable is created with the variable type as* ***Number****.*
iv. Click **Apply**.

g. Convert the stock quantity string to number variable
i. From the Actions panel, drag and drop the **String: To number** action to the bot editor.
ii. In the **Enter the string** field, provide the stock value string variable.
iii. In the **Assign the output to variable** field, create and assign the variable to the output.
Note: *Make sure that the variable is created with the variable type as* ***Number****.*
iv. Click **Apply**.

h. Using the **If else** command, if stock value is less than or equal to 75, Update **YES** in the reorder column
i. From the Actions panel, drag and drop the **If** action to the bot editor.
ii. Select the **Number variable** condition from the Condition field.
iii. In the **Number variable** field, select the **stock quantity-number** variable from the drop-down list.
iv. Select the **Less Than or Equal To (<=)** condition from the drop-down list.
v. Enter the value as **75** in the Value field.
vi. Click **Apply**.
vii. If **true**, from the Actions panel, drag and drop the **Excel advanced: Switch to sheet** action.
viii. Select the **Name** radio button and specify the worksheet name.
ix. Click **Apply**.
x. From the Actions panel, drag and drop the **Excel advanced: Set cell** action within the loop.
xi. Select the **Specific cell** radio button and specify the column alphabet along with the string count variable from where you want to store the value.
xii. Set the **Cell value** as **YES**
xiii. Click **Apply**.
xiv. From the Actions panel, drag and drop the **Excel advanced: Switch to sheet** action.
xv. Select the **Name** radio button and specify the worksheet name.
xvi. Click **Apply**.

i. Else, update the Item Reorder status to **NO**.
   i. From the Actions panel, drag and drop the **Else** condition within the **If** loop.
   ii. From the Actions panel, drag and drop the **Excel advanced: Switch to sheet** action.
   iii. Select the **Name** radio button and specify the worksheet name.
   iv. Click **Apply**.
   v. From the Actions panel, drag and drop the **Excel advanced: Set cell** action within the **Else** loop.
   vi. Select the **Specific cell** radio button and specify the column alphabet along with the string count variable from where you want to store the value.
   vii. Set the **Cell value** as **NOT YET**.
   viii. Click **Apply**.
   ix. From the Actions panel, drag and drop the **Excel advanced: Switch to sheet** action.
   x. Select the **Name** radio button and specify the worksheet name.
   xi. Click **Apply**.
   xii. From the Actions panel, drag and drop the **Number: Increment** action at the end of **IF: Else** loop.
   xiii. In the **Enter number** field, use the **Count** variable.
   Note**: Make sure that the variable is already created with the variable type as **Number and the **Default value** as 2.
   xiv. In the **Enter increment value** field, enter the increment value.
   xv. In the **Assign the output to variable** field, specify the same variable to the output.
   xvi. Click **Apply**.

2. Retrieve and save data from one workbook to another workbook using Append function

a. From the Actions panel, drag and drop the **Excel advanced: Open** action to the bot editor.
b. In the Action details panel, enter a new session in the **Session name** field.
c. Click **Desktop file** and enter the file path with name.
d. Open the file in a **Read-write** mode and select the **Sheet contains a header** checkbox.
e. Click **Apply**.
f. From the Actions panel, drag and drop the **Excel advanced: Append worksheet** action at the end.
g. Enter the session name.
h. In the **Append from workbook** field, enter the source workbook name.
i. In the **Enter worksheet name** field, enter the name of worksheet to be retrieved from source workbook.
j. Click **Apply.**

3. Rename and Close a worksheet

a. From the Actions panel, drag and drop the **Excel advanced: Rename worksheet** action at the end.
b. Enter the session name.
c. In the **Enter worksheet name** field, enter the existing worksheet name.
d. In the **Enter new name for worksheet** field, enter the new worksheet name.
e. Click **Apply.**
f. From the Actions panel, drag and drop the **Excel advanced: Close** action at the end.
g. In the Action details panel, enter the active session name in the **Session name** field.

h. Select the **Save changes when closing file** checkbox to save the worksheet.
i. Click **Apply.**
j. Repeat the steps f. to i. to close the Inventory worksheet by specifying the session name.

Congratulations! You have now successfully created the bot that calculates the remaining quantity from the quantity count in the received and Issued worksheet using VLOOKUP function. Also, the bot renames a worksheet and appends the data from another worksheet.