

REPORT

EMAIL AUTOMATION USING RPA (Robotic Process Automation)

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Introduction:-

In industries while conducting workshops, competitions etc. it is necessary to send bulk certificates to candidates that to with specific certificates for a specific candidate.

Through this project, we can create a system that will automatically sends the certificates to candidates through email with a particular subject line and body of email. For this first we should store all the certificates of candidates in the same order as stored in the excel. All these certificates (Attachments) should have a common path except the last value. We will be using Email SMTP-POP3 VOB and Excel VBO.

Tool to be used:

-> Blue Prism

About Blue Prism

Introduction to Blue Prism:-

Blue prism is a UK-Based Software Company and is one of the leading robotic process automation tools. It is used to automate mundane tasks such that they could operate without any manual

intervention. Blue prism has gained edge over its competitors as it has better security, flexibility, scalability, compliance, and resilience.

Pre-requirements for Blue Prism

The following are the prerequisites for the Blue Prism. It is the only software which ?

Creates and supports a digital workforce of industrial strength and enterprise scale

Does not require IT skills to implement

Can be implemented in sprints of 4 to 8 weeks (Start to finish)

Is very low cost compared to the TCO of alternative solutions

Provides tremendous payback with self-funding returns and an ROI that has been as high as 80%

Can be managed within IT infrastructure and processes

Project Idea:

In industries while conducting workshops, competitions etc. it is necessary to send bulk certificates to candidates that to with specific certificates for a specific candidate. Through this project, we can create a system that will automatically sends the certificates to candidates through email with a particular subject line and body of email. For this first we should store all the certificates of candidates in the same order as stored in the excel. All these certificates (Attachments) should have a common path except the last value. We will be using Email SMTP-POP3 VOB

and Excel VBO.

Project Objectives:

By the end of this project, you will:

- Gain insights into building blocks of blue prism automation.
- Importing MS Excel VBO (Visual Basic for Applications) in Blue Prism.
- Importing Email VBO (Visual Basic for Applications) in Blue Prism.
- Tuning Process Studio with specific needs.
- Working with different stages in the Process studio.
- Building a bot to automatically send mails with attachments to a list of people.

Project Flow:

- Creating a Blue prism Process Model and binding it with a MS Excel VBO and Email VBO.
- Importing Blue Prism MS Excel VBO (Visual Basic for Applications)
- Importing Email VBO (Visual Basic for Applications)
- Binding Process Model with MS Excel VBO.
- Binding Process Model with Email VBO.
- Opening MS Excel Workbook.
- Specifying Blue Prism Stages to work on MS Excel Workbook in Prism.

- Tuning Process Flow with Blue Prism Actions.
- Closing MS Excel Workbook.
- Tuning Process Flow with Blue Prism Actions.

To accomplish this, we have to complete all the activities and tasks listed below:

- Configure the Process Model
 - Import MS Excel VBO
 - Import Email VBO
 - Process Model binding with MS Excel VBO
 - Process Model binding with Email VBO
- Adding Process Stages
 - Create Instance
 - Open Excel file
 - Getting email IDs
 - Closing Excel file
 - Configuring Email
 - Fetching attachments
 - Sending mails
- Test the Model
 - Test Process Model

Prerequisites:

To complete this project, you must require the following concepts and software's:

- Knowledge of programming language, network structures, Should know how to perform administrator activities on windows server. Understanding of Installation models and design of infrastructure. Able to detect repeating tasks and automate them.
- MS Excel basic knowledge like Cell, Worksheet, Workbook, etc. (<https://excelchamps.com/blog/learn-basic-excel>)
- Email Should be enabled with third party access.

Software:

Installation and Setup Guide for Blue Prism:

<https://www.youtube.com/watch?v=SKMXYqmvAZI>

Installation and Setup Guide for MS Excel:

https://microsoft_excel.en.downloadastro.com

Hardware Required:

The following is the Hardware required to complete this project:

- Internet connection to download and activate
- Administration access to install and run Blue Prism
- Minimum 10GB free disk space
- Windows 8.1 or 10 (64-bit version only) OR Cloud: Get started free, *Cloud account required.

Minimum System Requirements To run Office Excel 2013, your computer needs to meet the following minimum hardware requirements:

- 500 megahertz (MHz)
- 256 megabytes (MB) RAM
- 1.5 gigabytes (GB) available space
- 1024x768 or higher resolution monitor

What is email automation?

Email automation is a way to create emails that reach the right people with the right message at the right moment—without doing the work every time, sending automated messages leveraging a marketing automation tool.

When you link your website analytics with your email marketing

platform, you can target people based on behavior, preferences, and previous sales. Then you can personalize each customer's experience and increase the relevance of your automated campaigns.

Email automation is a way to create emails that reach the right people with the right message at the right moment—without doing the work every time, sending automated messages leveraging a marketing automation tool.

The benefits of email automation

Email automation lets you:

1. Personalize your customers' experiences.

Research backs up what most marketers already know:
Customers love personalization.

--> 90% of consumers find personalized content very or somewhat appealing.

--> 91% of consumers are more likely to patronize businesses that provide individualized recommendations and offers.

--> A recent experiment revealed that when shoppers knew an ad was based on their activity on the site, their click-through rates increased by 11% and revenue from the product grew by 38%.

--> In 2019, 72% of customers only respond to marketing

messages that target their interests.

--> The leading type of personalization experience that marketers use is email.

2. Make the most of your marketing team.

Automation is changing the way that all kinds of teams do business. According to a 2017 survey of information workers, respondents said they believe automating email marketing can improve employee productivity:

--> 69% said automation could help reduce wasted time.

--> 59% said that they could save at least 6 hours a week if the repetitive aspects of their job were automated.

--> 72% said that they would use the time they saved to focus on higher-value work.

3. Improve your customer retention rate.

It's much easier and more cost effective to sell to an existing customer than to convert a new one, and with automation, you can stay in touch better than ever before. Schedule your messages so that your customers don't go too long without hearing from you—and be sure the copy is relevant to maximize its impact.



