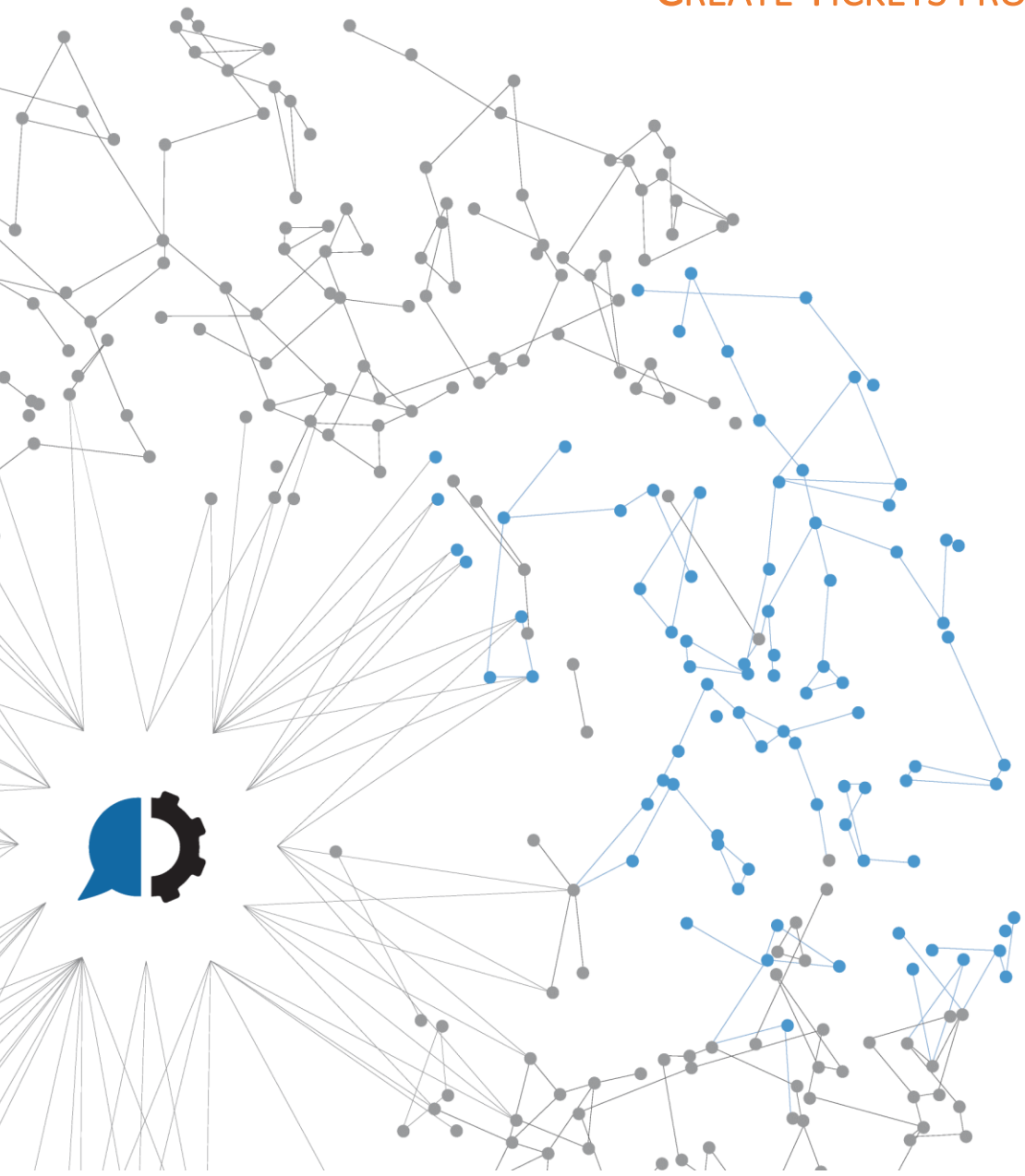
HubSpot Bot

Create Tickets from Excel INPUT



© HelpSystems LLC. All rights reserved.
All trademarks and registered trademarks are the property of their respective owners.

Content

Overview 3

Prerequisites 4

How to import an Automate task 6

How to generate the input file 7

How to execute the HubSpot Bot - Create Tickets from Excel INPUT 8

Appendix A – HubSpot tickets view and Excel Examples 10

Overview

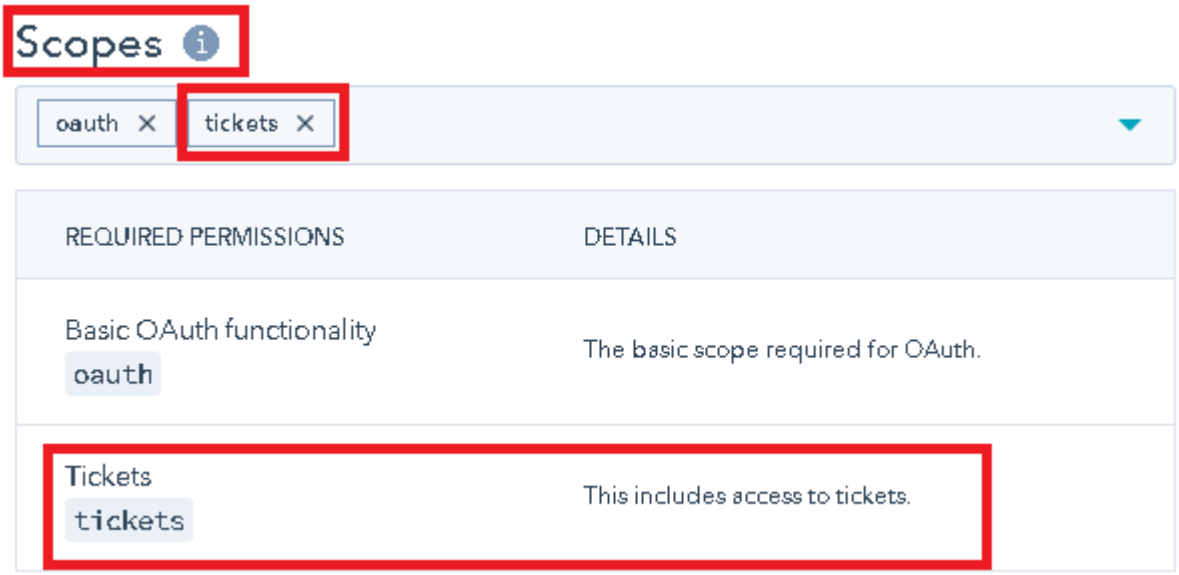
This how to guide introduces the *HubSpot Bot - Create Tickets from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are reports generation, file movement, data import and export, and scheduling batch processing.

HubSpot Bot - Create Tickets from Excel INPUT is based in the HubSpot REST API, specifically the ***Tickets API***. It creates tickets in HubSpot and update the Input Excel file with the result of the execution. Carefully check the Prerequisites and the How To Generate the Input File sections to get detailed information.

A *HubSpot Bot - Generate Connection Token* is also available that will provide you an easy way to create any needed token for this bot to work. Remember that the token by default expires every 6 hours.

PREREQUISITES

- Automate: The HubSpot bot depends on Automate software in order to work. The minimum supported versions are:
    - Automate Ultimate 11.2
    - Automate Plus 11.2
    - Automate Desktop 11.2
- Automate Markup Language file (.AML): The primary file type used in Automate which contains the steps of our HubSpot bot task
- HubSpot: Our minimal requirements are
    - HubSpot REST API Enabled: It is enabled by default.
    - HubSpot REST API – Connected App Created and OAuth Enabled and Token generated: You can check the HubSpot documentation on how to create a connected application in this link and the procedure on how to configure the OAuth in this link. Within this procedure you will be able to obtain the connection token that's needed for this bot to operate. Remember that the token by default expires every 6 hours.
    - HubSpot connected application **Ticket Scope**: It is important that the necessary scopes are selected when configuring the connect application. This will permit the execution of the **Tickets API** from this Automate HubSpot bot.



- Automate constants to be created to set the HubSpot connection values:
    - const_HubSpotURL: HubSpot URL for connection. Example: ***https://api.hubapi.com***
    - const_HubSpotToken: HubSpot Token to execute the connection/request with. It can be set to the token value or the path in which the .txt file with the token inside is located. Example: C:\Automate\HubSpotToken.txt

      In the case of using a .txt file, the token must have the next format/structure:

      access_token:TokenString

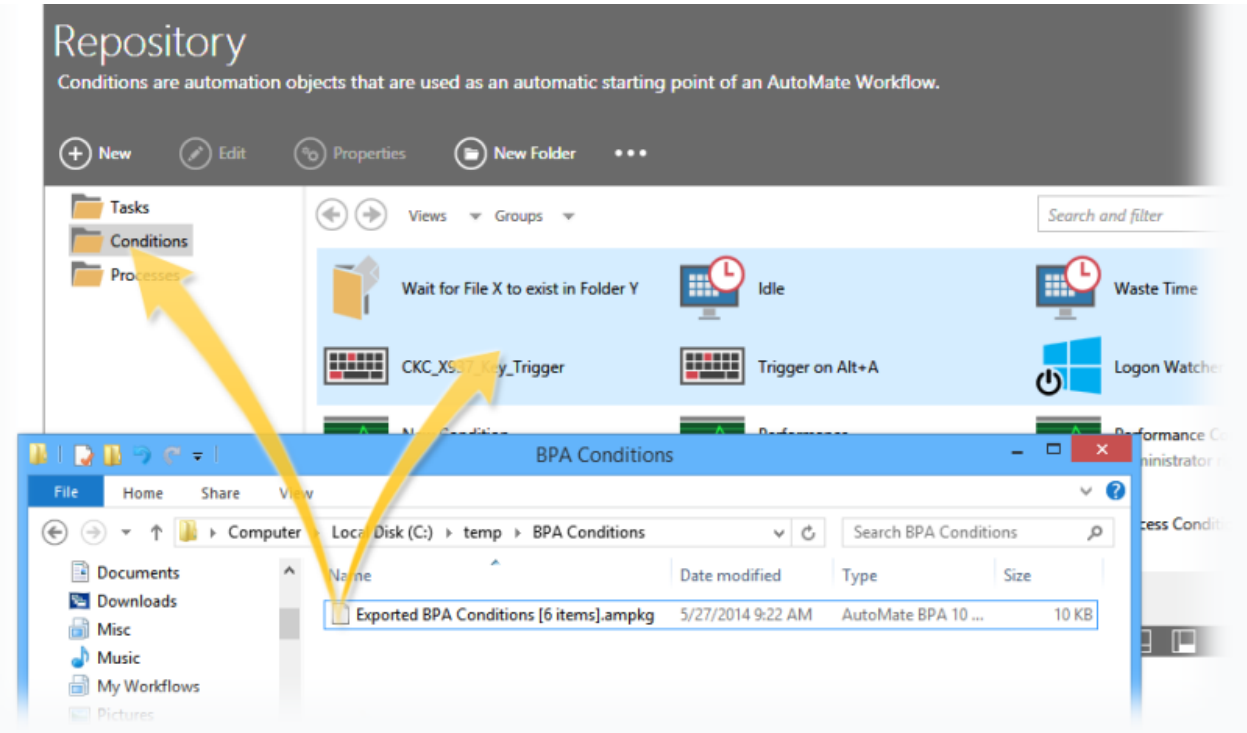
      Example:

How to import an Automate task

Compatible file types can be imported to the repository via drag-and-drop

From the Server Management Console, navigate to the Repository section

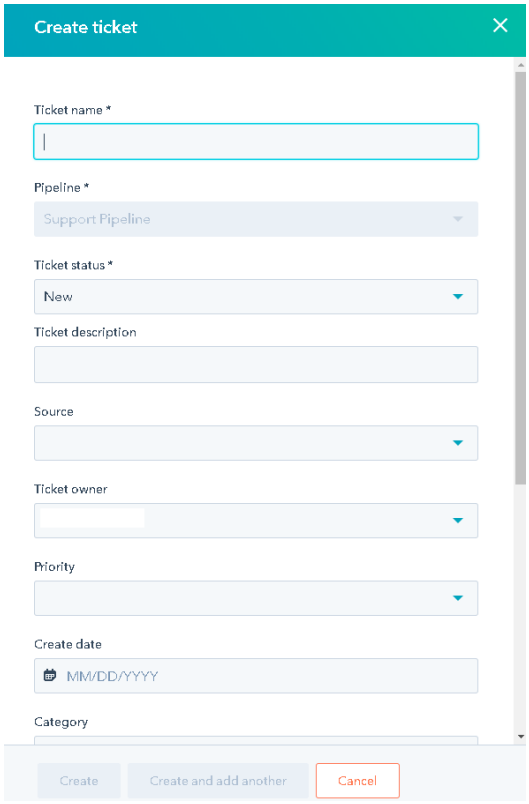
Drag the desired file(s) from its original location and drop them into the folder in the SMC. Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



HOW TO GENERATE THE INPUT FILE

The input file ***HubSpot Create Tickets INPUT.xlsx"*** shipped with this HubSpot bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The HubSpot create ticket screen:



The Excel INPUT file

	B	C	D	E	F	G	H	I
1	HubSpot - Ticket Fields					Created?	Result Details	
2	**Description**	**Pipeline ID** (Example: 0 = Support Pipeline)	**Ticket status (Pipeline Stage)** (id that corresponds to what you have set in HubSpot. Example: 1 = New)	**Priority** Possible values: LOW, MEDIUM, HIGH	**Source** Possible Values: CHAT, EMAIL, FORM and PHONE	**Yes/No**	**Date**	**Ticket ID / Result Message**

NOTES:

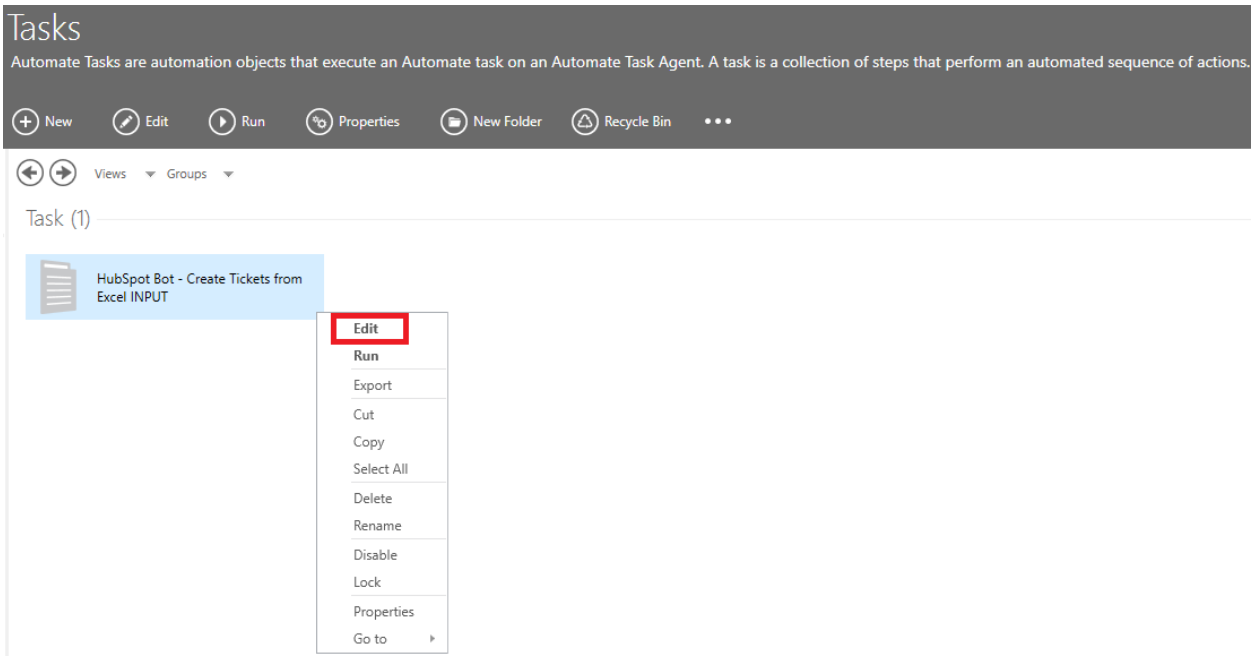
- ***Red fields*** are mandatory.
- If one of the non-mandatory fields is not defined, the ticket will be created with the default value of your environment or will be created as blank.
- Columns G to I in the INPUT file will be filled with the result of the execution and the ticket ID that was opened with. See APPENDIX A for an example on the resulting.

How to execute the HubSpot Bot - Create Tickets from Excel INPUT

If this is the first time running this task, we will need to set some parameters

Open the Server Management Console and locate the imported task

Edit the imported task by right clicking on the task and selecting edit



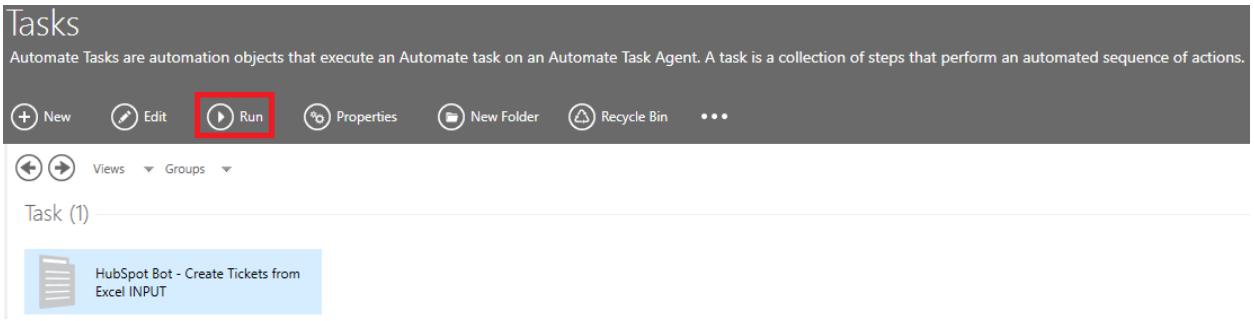
In step 4 edit the next variable according to you desired output:

- var_ExcelInputFile: The complete path and filename of the HubSpot Create Tickets INPUT.xlsx

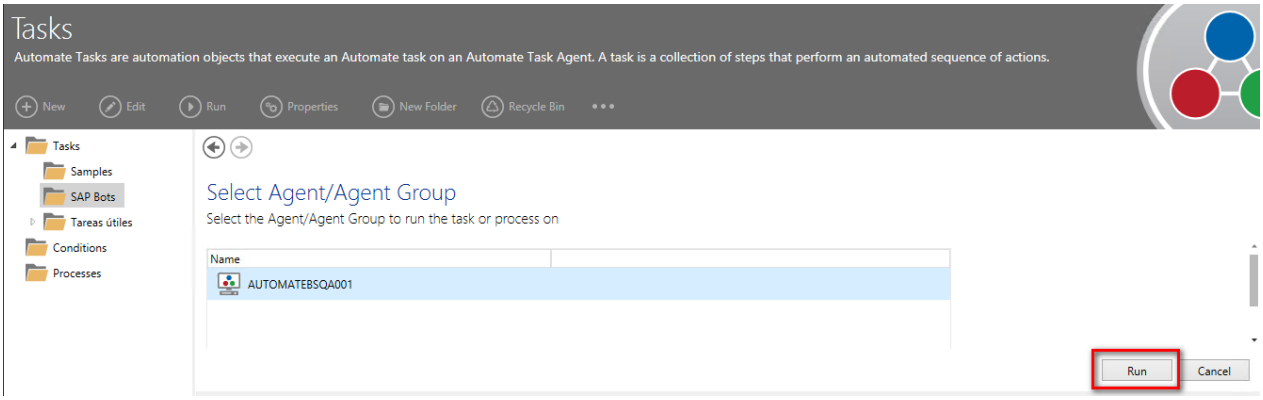
  Example: ***"C:\Automate\HubSpot Create Tickets INPUT.xlsx"***

Save and close the task

Select the task and click on Run



Select your Agent and click on Run again



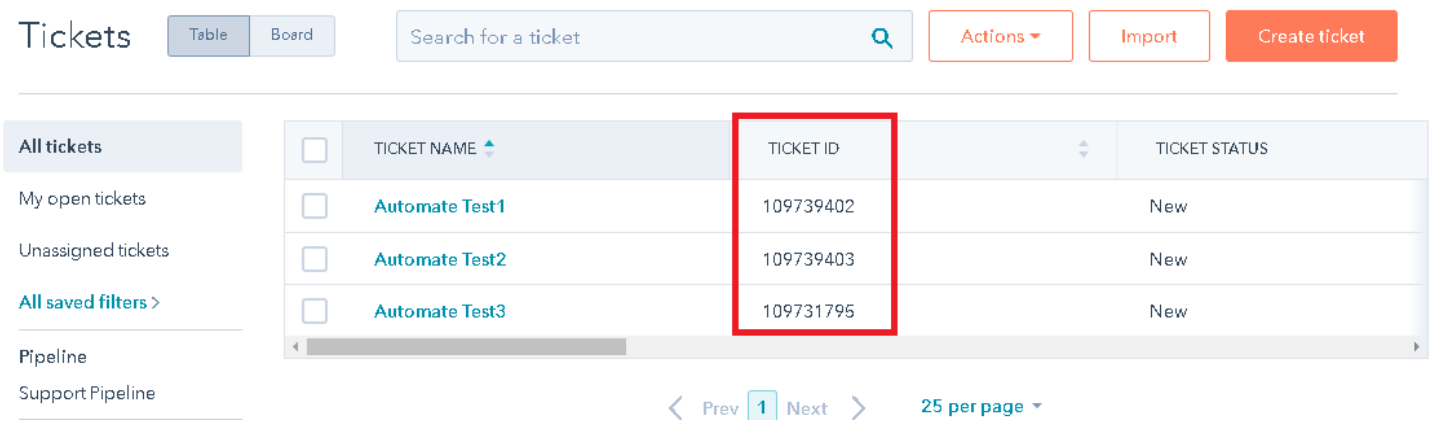
APPENDIX A – HUBSPOT TICKETS VIEW AND EXCEL EXAMPLES

INPUT Excel file with results:

A	B	C	D	E	F	G	H	I
HubSpot - Ticket Fields						Created?	Result Details	
Ticket Name (Subject)	**Description**	**Pipeline ID** (Example: 0 = Support Pipeline)	**Ticket status (Pipeline Stage)** (id that corresponds to what you have set in HubSpot. Example: 1 = New)	**Priority** Possible values: LOW, MEDIUM, HIGH	**Source** Possible Values: CHAT, EMAIL, FORM and PHONE	**Yes/No**	**Date**	**Ticket ID / Result Message**
Automate Test1	This is a ticket created by AutoMate	0	1	LOW	FORM	YES	26/03/2020 5:07:46 PM	109739402
Automate Test2	This is a ticket created by AutoMate	0	1	MEDIUM	FORM	YES	26/03/2020 5:07:47 PM	109739403
Automate Test3	This is a ticket created by AutoMate	0	1	HIGH	FORM	YES	26/03/2020 5:07:49 PM	109731795

Note that the execution result is written from column G to I. Column I will have the ticket ID that the ticket was created with in HubSpot.

HubSpot tickets view result:



APPENDIX A - TROUBLESHOOTING

- Logs: Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *HubSpot Bot - Create Tickets from Excel INPUT.*

helpsystems

www.helpsystems.com

About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and Automate processes, encrypt and secure data, and provide easy access to the information people