Salesforce Bot

Close Cases from Excel INPUT

Content

Overview

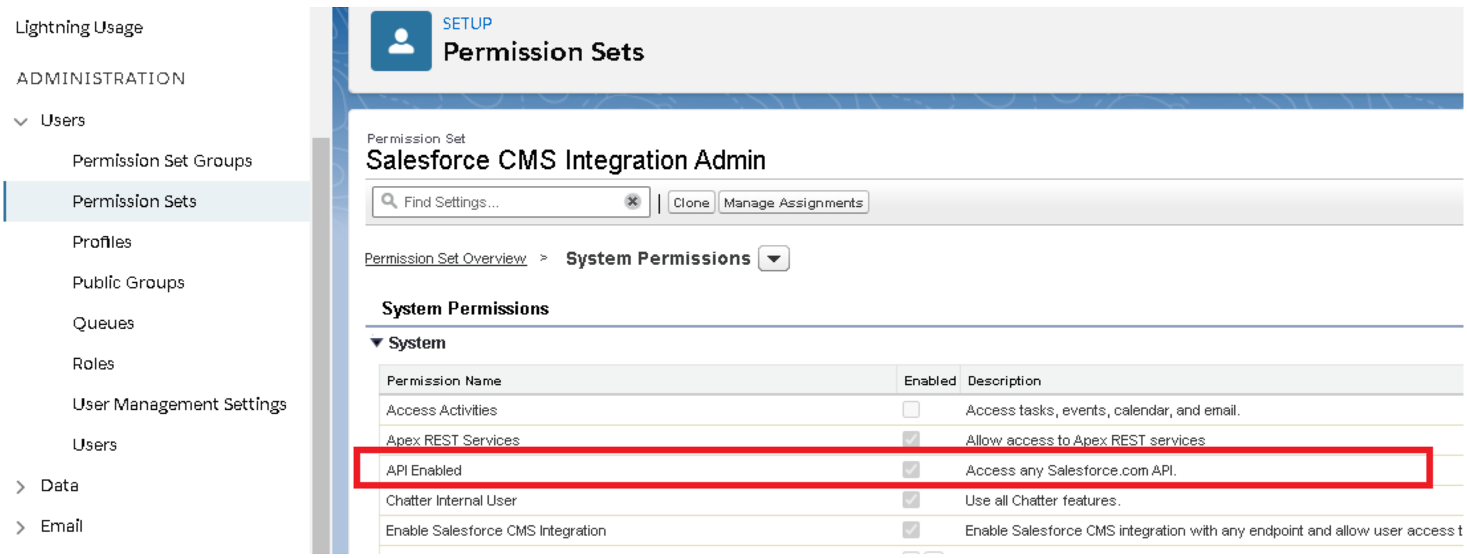
This how to guide introduces the *Salesforce Bot - Close Cases from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which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

Salesforce Bot - Close Cases from Excel INPUT is based in the Salesforce REST API. It closes cases in Salesforce and update the input Excel file with the result of the execution. Look over the Prerequisites and the How To Generate the input File sections to get detailed information.

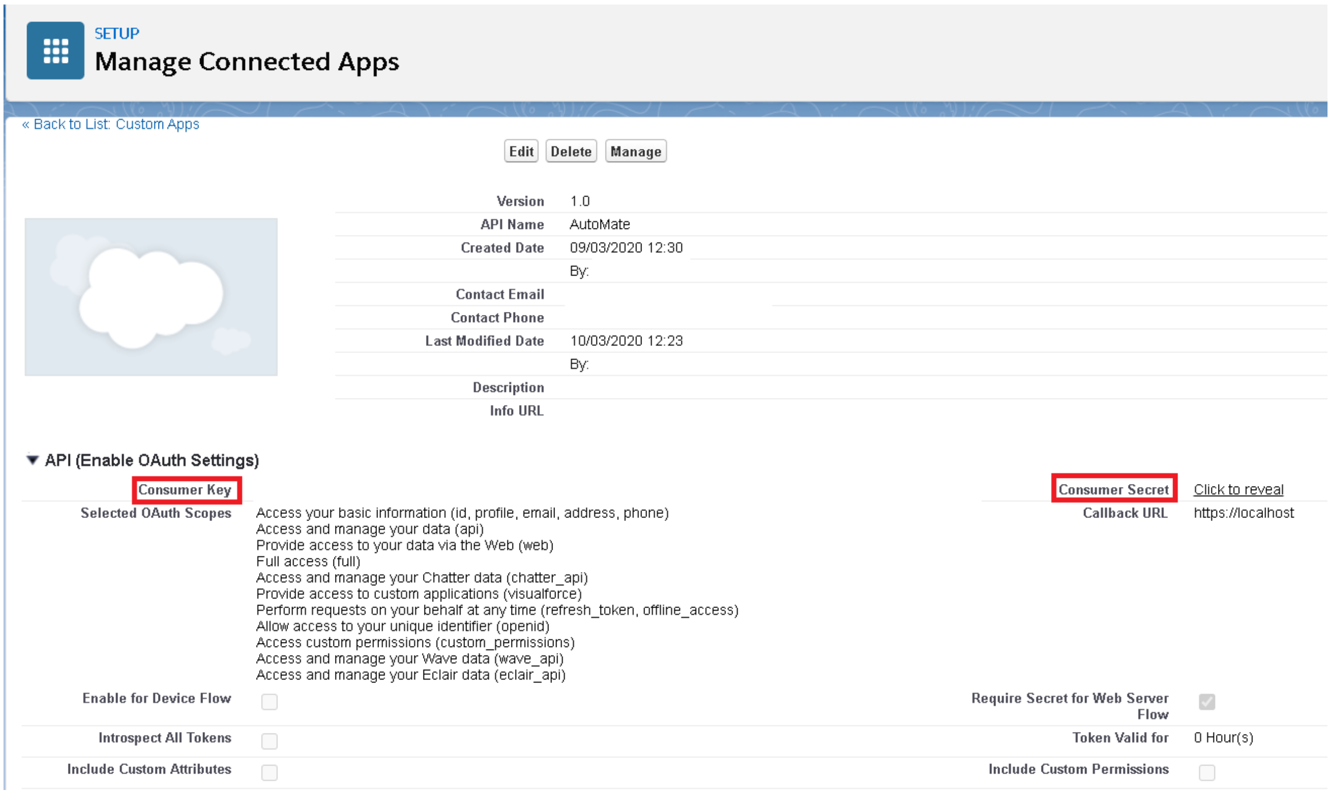
There is also available a *Salesforce Bot - Generate Connection Token* that will provide you an easy way to create the necessary token for this bot to work.

PREREQUISITES

- Automate: The Salesforce bot depends on Automate software in order to work. The minimal 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 Salesforce bot task
- Salesforce: Our minimal requirements are:
  - Salesforce REST API – Enabled: You can check this by going to Salesforce Setup > Users (Administration) > Permission Sets > Salesforce CMS Integration Admin > System Permissions:



- Salesforce REST API – Connected App Created and OAuth Enabled: You can check the Salesforce documentation on how to connect an application in this link. Once you configure your connected app, it will be shown as shown in next picture:



- Salesforce Token: A token string to connect to Salesforce. You will find information related to the token generation and the OAuth configuration in this link. Remember the **BOT - GENERATE CONNECTION TOKEN** is also available that provides an easy way to generate a Token when necessary for this bot to work.

- Salesforce API Version: This bot was created using the v48.0 API.

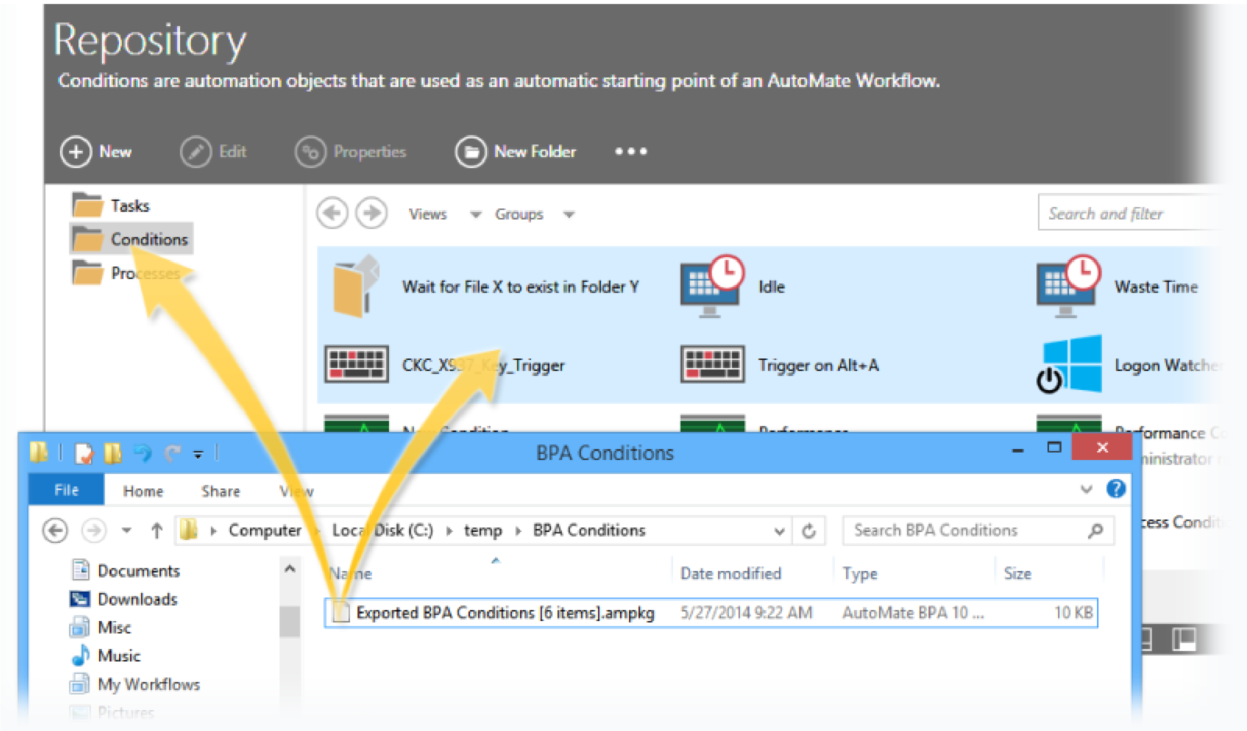
- Automate constants to set the Salesforce connection values:
  - const_SalesForceURL: Salesforce URL for connection. It represents your Salesforce instance.
  - const_SalesForceToken: Salesforce Token to execute the connection/request with. It can be set to the token value itself or the path in which the .txt file with the token inside is located. Example: C:\Automate\SalesForceToken.txt

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 ***“Salesforce Close Cases INPUT.xlsx”*** shipped with the Salesforce bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Excel INPUT file

	A	B	C	D	E
1	SalesForce - Case Fields (Will be closed with Status “Closed”		Closed?	Result Details	
2	Case Number	Comment to be added when closed.	Yes/No	Date	Message

NOTES:

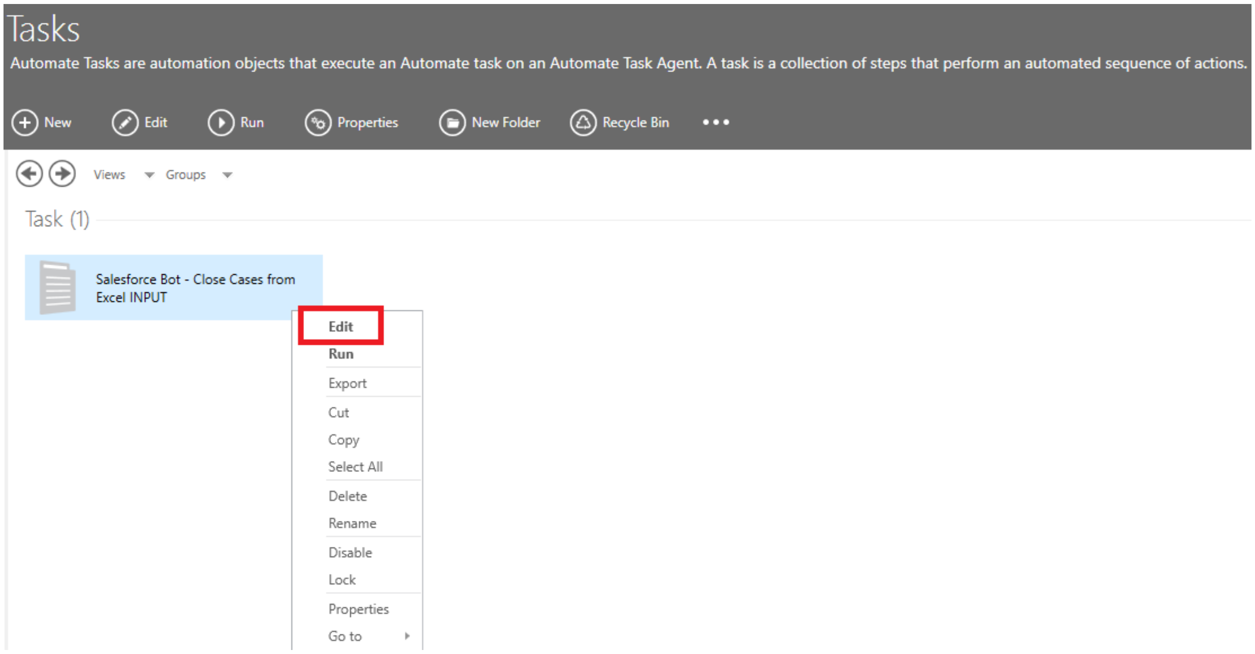
- ***Case Number*** is mandatory.
- Columns C to E in the INPUT file will be filled with the result of the execution. See Appendix A for an example of the result.

HOW TO EXECUTE THE SALESFORCE BOT - CLOSE CASES 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



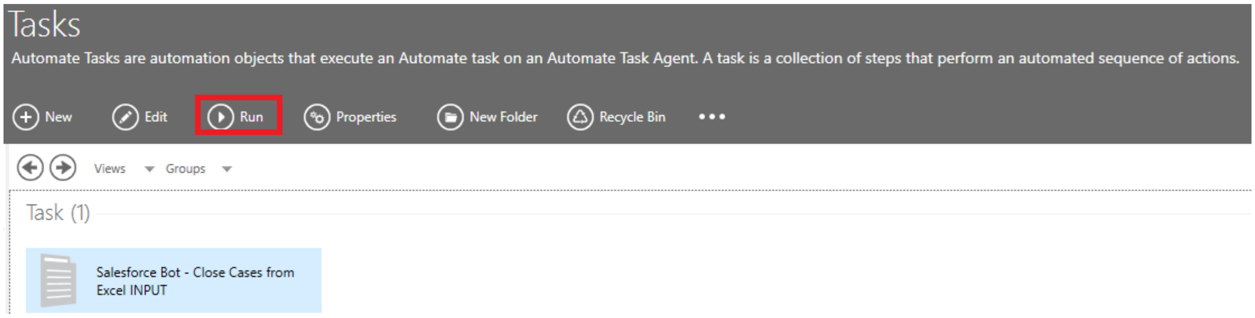
In step 4 edit the next variable according to your desired output:

- var_ExcelInputFile: The complete path and filename of the Salesforce Close Cases INPUT.xlsx.

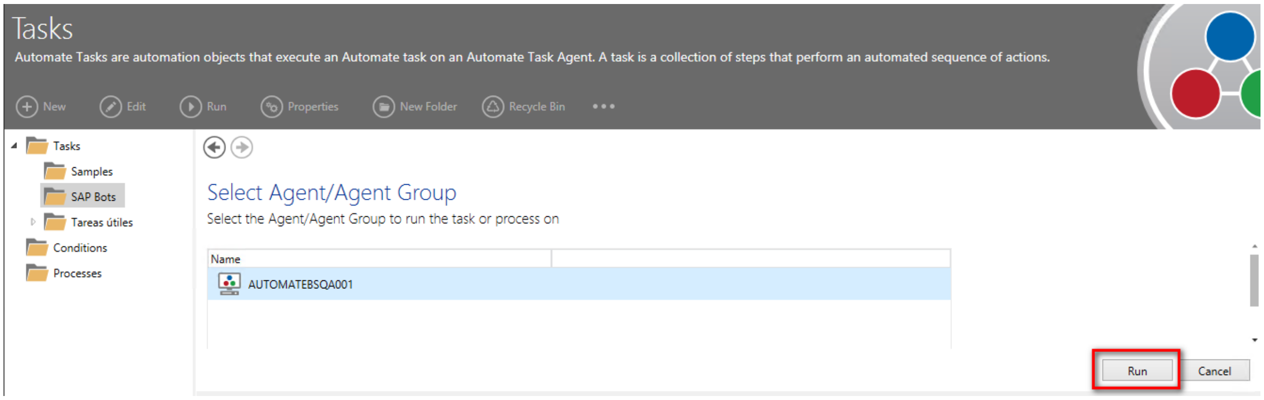
  Example: ***"D:\Automate\SalesForce Close Cases INPUT.xlsx"***

Save and close the task

Select the task and click on Run



Select your Agent and click on Run again



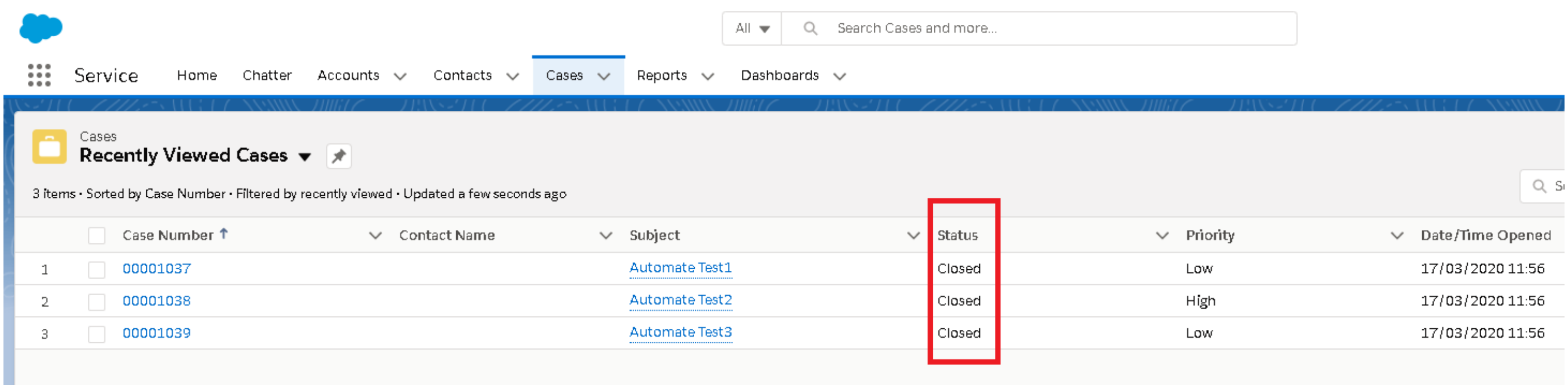
Appendix A – Salesforce cases view and Excel examples

INPUT Excel file with results:

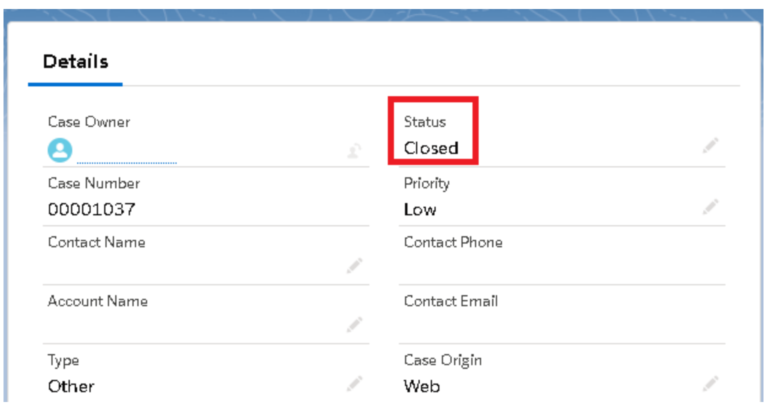
	A	B	C	D	E
1	SalesForce - Case Fields (Will be closed with Status "Closed"		Closed?	Result Details	
2	Case Number	Comment to be added when closed.	Yes/No	Date	Message
3	00001037	Closed by Automate	YES	17/03/2020 1:42:03 PM	The Case was Closed.
4	00001038	Closed by Automate	YES	17/03/2020 1:42:09 PM	The Case was Closed.
5	00001039	Closed by Automate	YES	17/03/2020 1:42:14 PM	The Case was Closed.

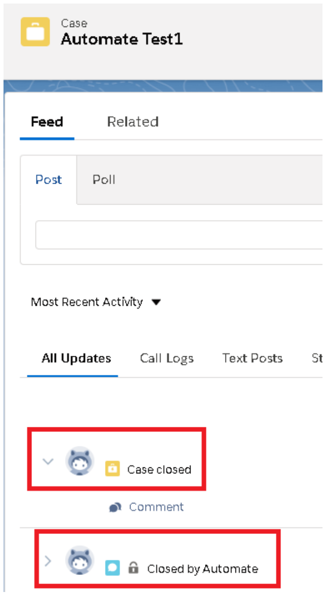
Note that the execution result is written from column C to E.

Salesforce cases view result:



Details and comment for the case 00001037:





APPENDIX B – 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 *Salesforce Bot - Close Cases from Excel INPUT.*