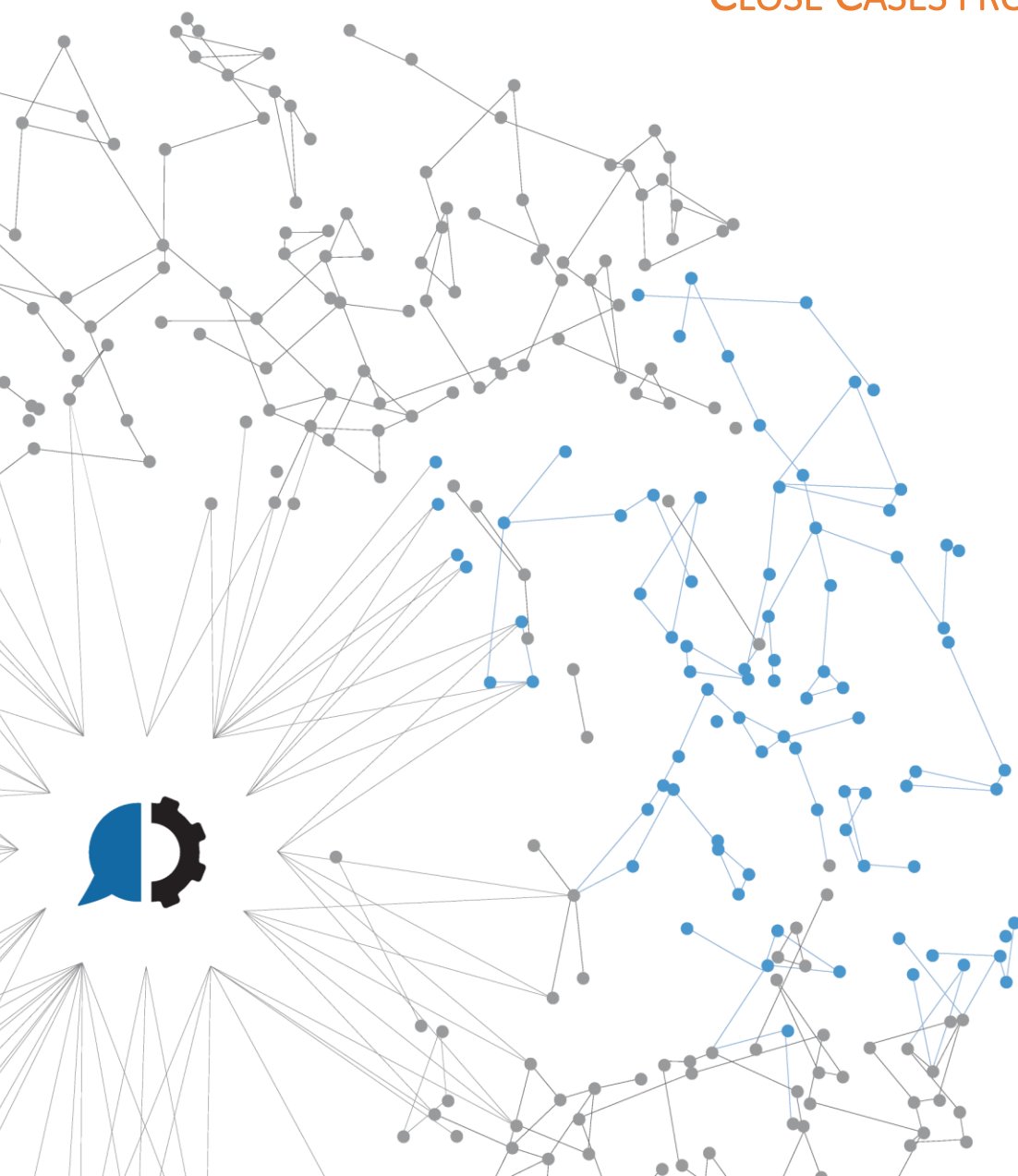




SALESFORCE BOT

CLOSE CASES FROM EXCEL INPUT





Content

OVERVIEW	3
PREREQUISITES	4
HOW TO IMPORT AN AUTOMATE TASK	6
HOW TO GENERATE THE INPUT FILE	7
HOW TO EXECUTE THE SALESFORCE BOT - CLOSE CASES FROM EXCEL INPUT	8
APPENDIX A – SALESFORCE CASES VIEW AND EXCEL EXAMPLES	10
APPENDIX B – TROUBLESHOOTING	11



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:

Lightning Usage

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data


> Email

The screenshot shows the Salesforce Setup interface for the 'Salesforce CMS Integration Admin' permission set. The 'System Permissions' section is expanded, showing a table of permissions. The 'API Enabled' checkbox is highlighted with a red box.

Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Apex REST Services	<input checked="" type="checkbox"/>	Allow access to Apex REST services
API Enabled	<input checked="" type="checkbox"/>	Access any Salesforce.com API.
Chatter Internal User	<input checked="" type="checkbox"/>	Use all Chatter features.
Enable Salesforce CMS Integration	<input checked="" type="checkbox"/>	Enable Salesforce CMS integration with any endpoint and allow user access t




- **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:

 **SETUP**

Manage Connected Apps

[« Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)



Version	1.0
API Name	AutoMate
Created Date	09/03/2020 12:30
By:	
Contact Email	
Contact Phone	
Last Modified Date	10/03/2020 12:23
By:	
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key	Consumer Secret	Click to reveal
Selected OAuth Scopes	Callback URL	https://localhost
Access your basic information (id, profile, email, address, phone) Access and manage your data (api) Provide access to your data via the Web (web) Full access (full) Access and manage your Chatter data (chatter_api) Provide access to custom applications (visualforce) Perform requests on your behalf at any time (refresh_token, offline_access) Allow access to your unique identifier (openid) Access custom permissions (custom_permissions) Access and manage your Wave data (wave_api) Access and manage your Eclair data (eclair_api)		
Enable for Device Flow	Require Secret for Web Server Flow	<input checked="" type="checkbox"/>
Introspect All Tokens	Token Valid for	0 Hour(s)
Include Custom Attributes	Include Custom Permissions	<input type="checkbox"/>

- **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

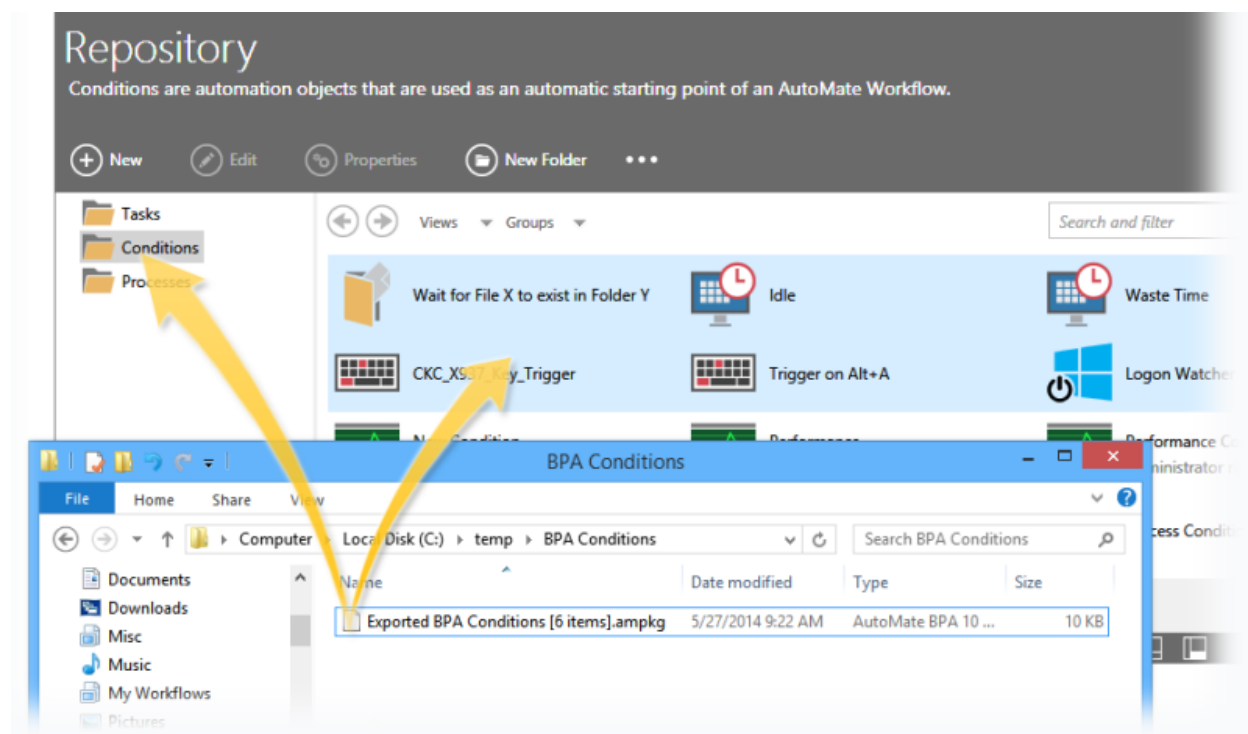


HOW TO IMPORT AN AUTOMATE TASK

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.

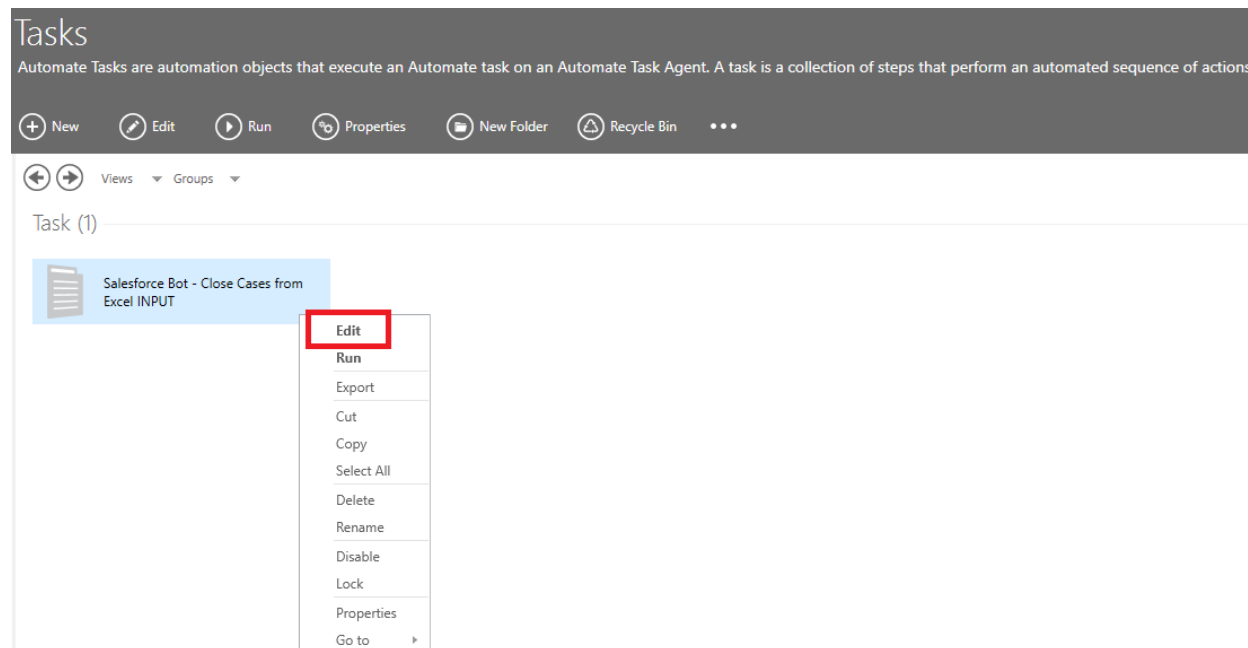


HOW TO EXECUTE THE SALESFORCE BOT - CLOSE CASES FROM EXCEL INPUT

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:

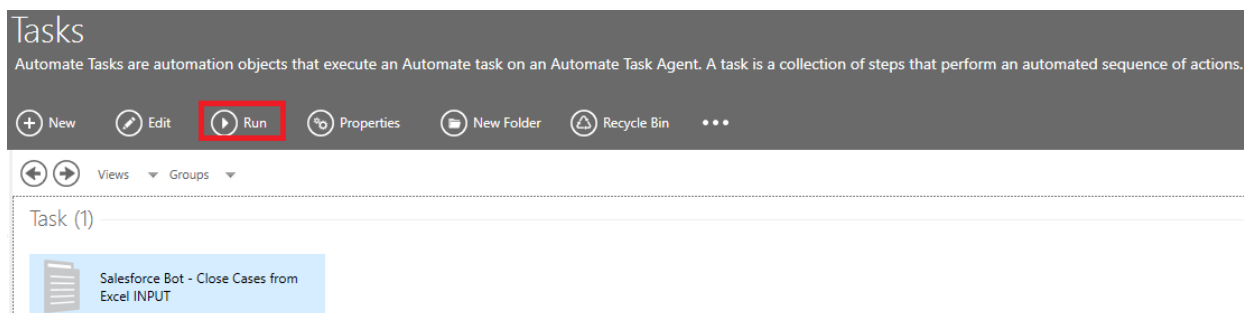
- [var_ExcelInputFile](#): The complete path and filename of the Salesforce Close Cases INPUT.xlsx.

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

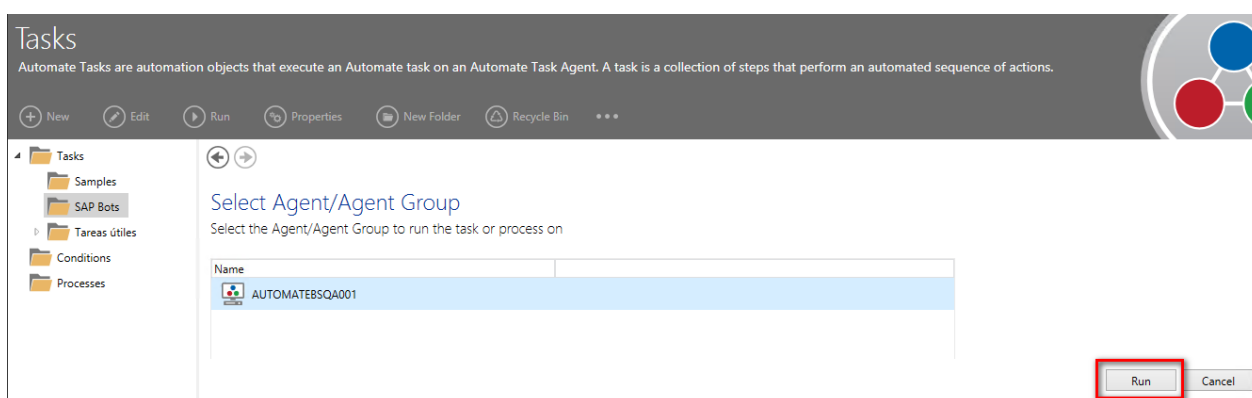
[Save and close](#) the task



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:

SalesForce - Case Fields (Will be closed with Status "Closed")		Closed?	Date	Result Details
Case Number	Comment to be added when closed.	Yes/No	Date	Message
00001037	Closed by Automate	YES	17/03/2020 1:42:03 PM	The Case was Closed.
00001038	Closed by Automate	YES	17/03/2020 1:42:09 PM	The Case was Closed.
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:



Service Home Chatter Accounts Contacts **Cases** Reports Dashboards

All Search Cases and more...

Cases

Recently Viewed Cases

3 items • Sorted by Case Number • Filtered by recently viewed • Updated a few seconds ago

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened
1	00001037		Automate Test1	Closed	Low	17/03/2020 11:56
2	00001038		Automate Test2	Closed	High	17/03/2020 11:56
3	00001039		Automate Test3	Closed	Low	17/03/2020 11:56

Details and comment for the case 00001037:

Details

Case Owner

Case Number

00001037

Contact Name

Account Name

Type

Other

Status

Closed

Priority

Low

Contact Phone

Contact Email

Case Origin

Web

Case

Automate Test1

Feed Related

Post Poll

Most Recent Activity

All Updates Call Logs Text Posts St

Case closed

Comment

Closed by Automate



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*.



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