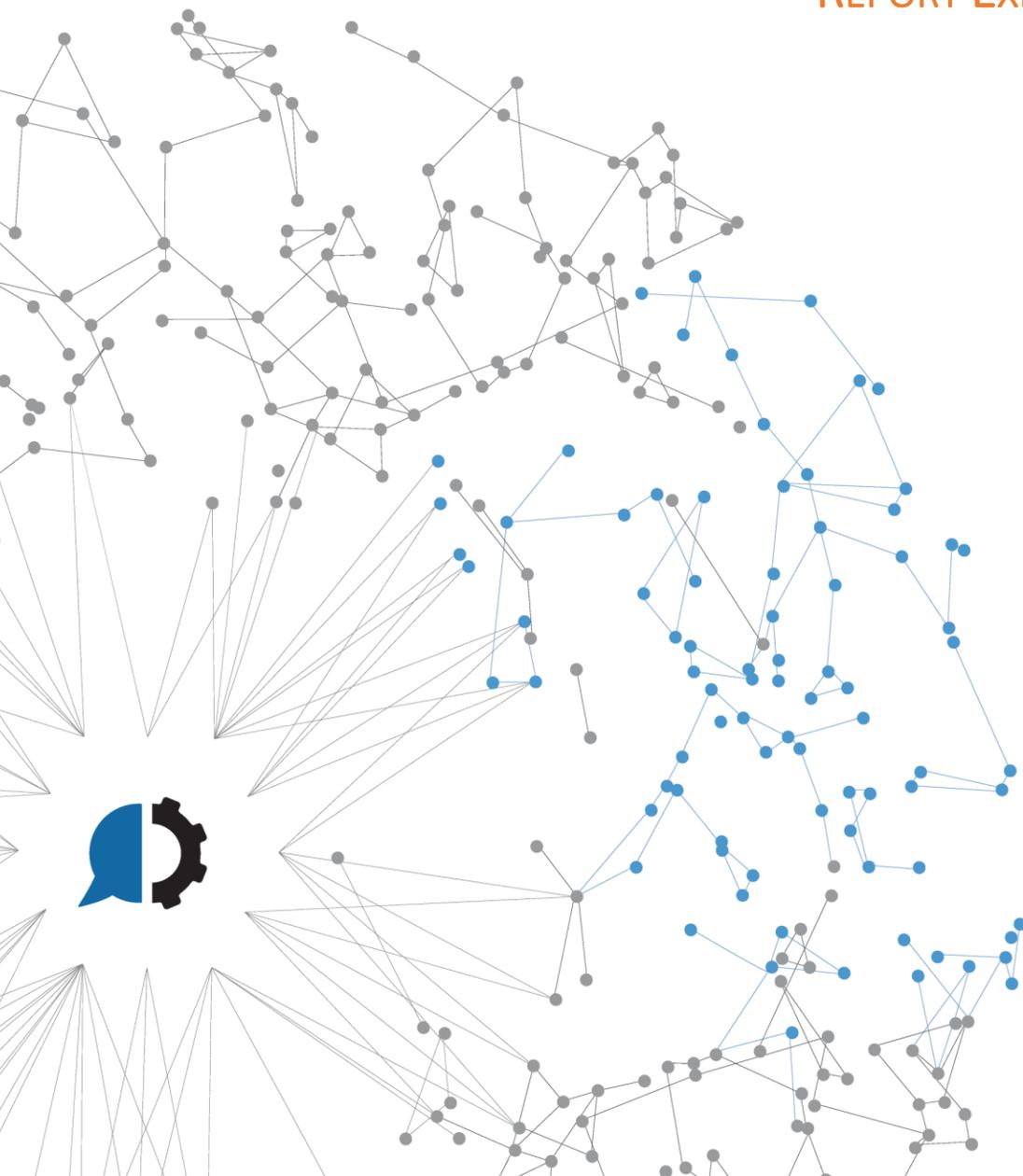




SALESFORCE BOT

REPORT EXPORTER TO EXCEL





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A blue graphic element on the left side of the page, consisting of three overlapping rectangular shapes that form an arrow pointing to the right.

OVERVIEW

This how to guide introduces the *Salesforce Bot - Report Exporter to Excel*. 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 - Report Exporter to Excel is based in the Salesforce REST API. This task exports a configured report in Salesforce to a local Excel file. Check carefully the [PREREQUISITES](#) and the [HOW TO EXECUTE THE SALESFORCE BOT - REPORT EXPORTER TO EXCEL](#) 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 Token needed 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' permission is highlighted with a red box, indicating it is checked and enabled.

| 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 close a connected application in this [link](#). Once you close and 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 | 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) | Callback URL | https://localhost |
| Enable for Device Flow | <input type="checkbox"/> | Require Secret for Web Server Flow | <input checked="" type="checkbox"/> |
| Introspect All Tokens | <input type="checkbox"/> | Token Valid for | 0 Hour(s) |
| Include Custom Attributes | <input type="checkbox"/> | 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 this **SALESFORCE BOT - GENERATE CONNECTION TOKEN** is also available that will provide you an easy way to generate a Token for this bot to work.
- [Salesforce API Version](#): This bot was created using the v48.0 API.
- [Automate constants to be Close 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

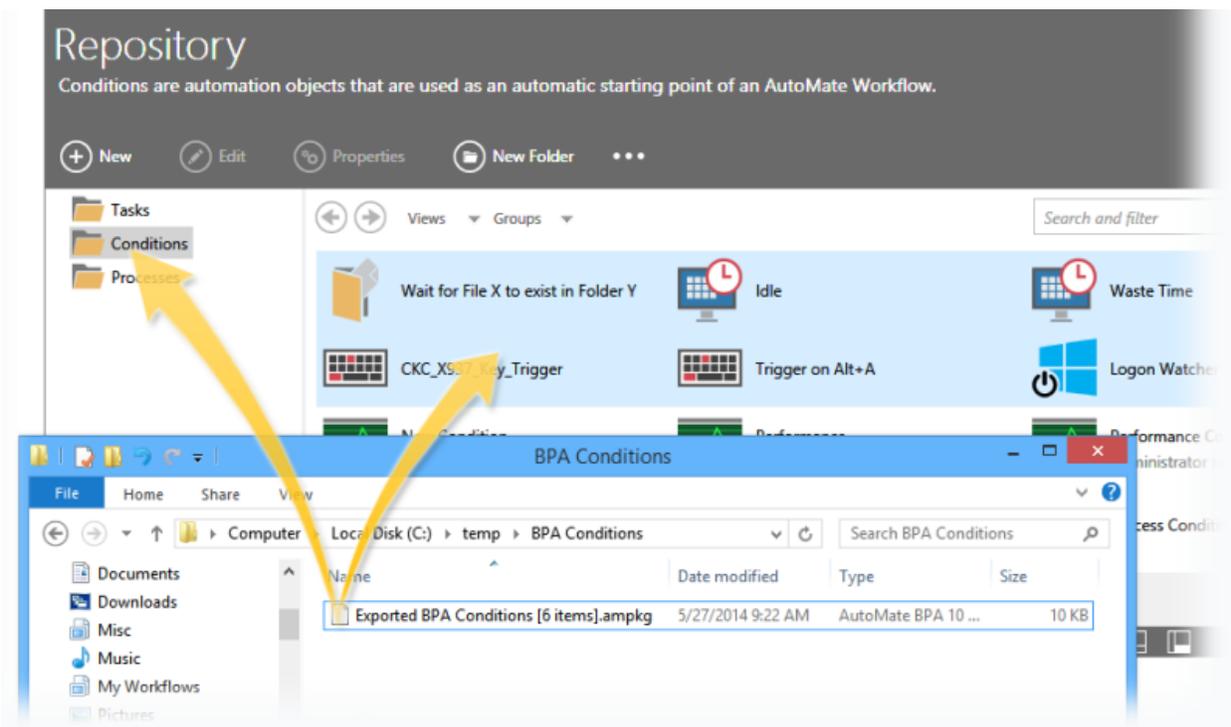


HOW TO IMPORT AN AUTOMATE TASK

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.



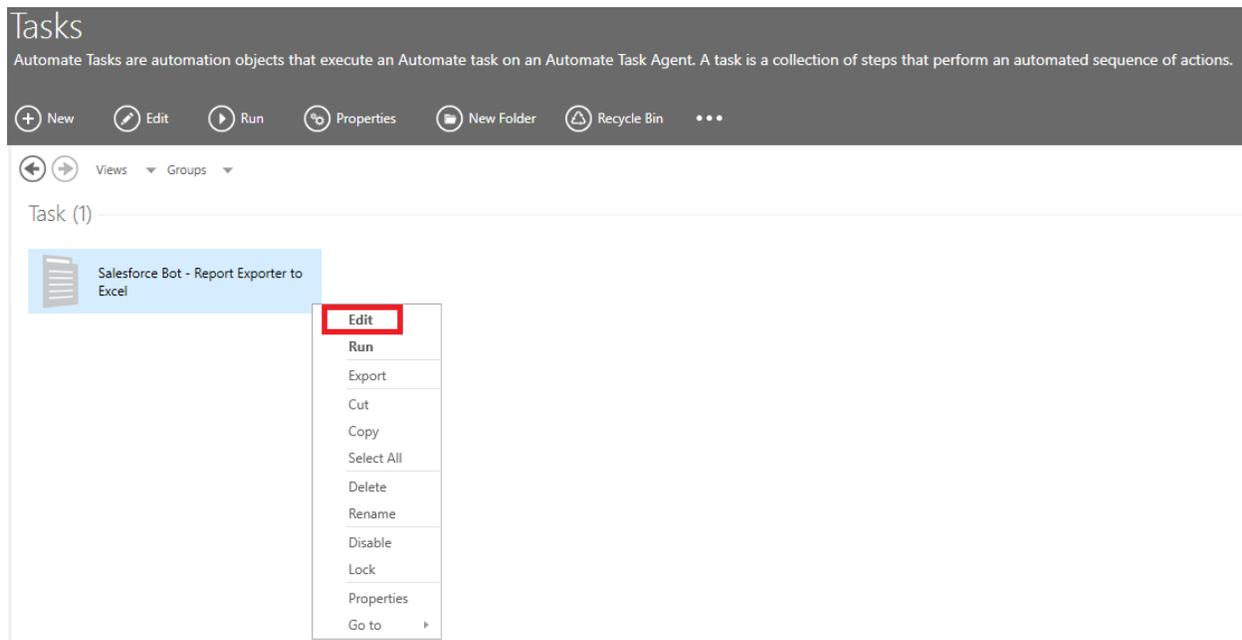


HOW TO EXECUTE THE SALESFORCE BOT - REPORT EXPORTER TO EXCEL

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](#)



For [step 2](#) edit the next variables according to your desired output:

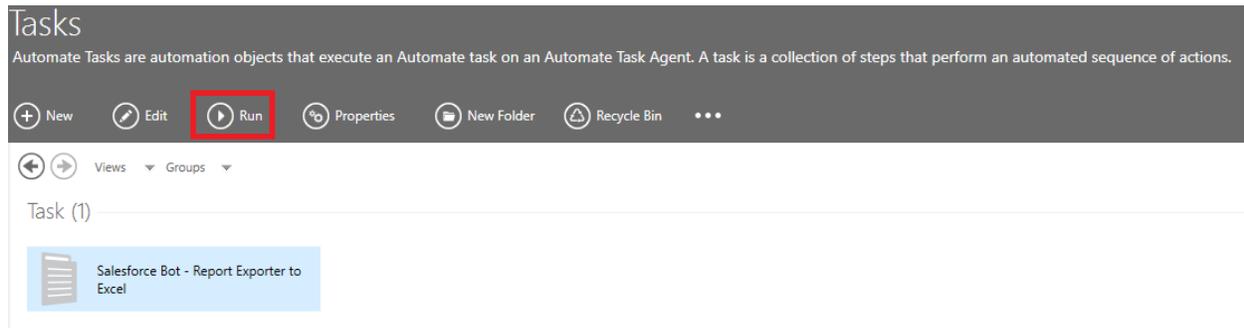
- [var_SalesForceReportName](#): The name of the report in Salesforce that you need to export to local excel.
- [var_SalesForceReportId](#): In the case that you have the internal ID of the report in Salesforce, you can set it using this variable. This is an optional setting. If not provided, the bot will request it from Salesforce using the Report Name set before.
- [var_ExcelName](#): The filename of the Excel that will be created. The extension of the file will be automatically set to **".xlsx"**.
- [var_ExcelOutputFile](#): The path to which the exported Excel file will be sent. By default, it is set to: C:\Automate\Tasks\<<TASK NAME>>.

Example: **"C:\Automate\Tasks\Salesforce Bot - Report Exporter to Excel"**

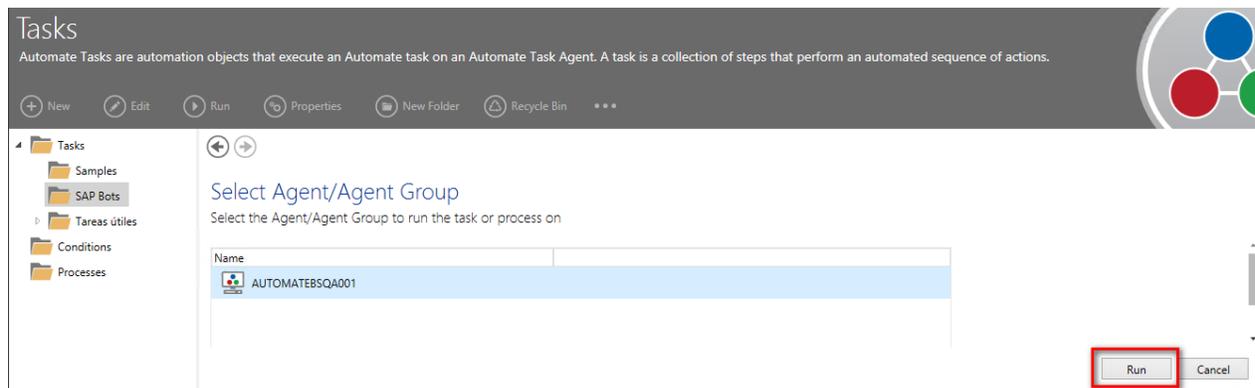
[Save and close](#) the task



Select the task and click on [Run](#)



Select your [Agent](#) and click on [Run](#) again





APPENDIX A – SALESFORCE REPORT VIEW AND EXCEL OUTPUT EXAMPLE

Report in Salesforce:

The screenshot shows the Salesforce interface. At the top, there is a navigation bar with 'Service', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Cases', 'Reports', and 'Dashboards'. The 'Reports' tab is selected. Below the navigation bar, the report header shows 'Report: Accounts' and 'Accounts Report Test'. The report content area displays 'Total Records: 1' and a table with one record.

| | Last Activity | Account Owner | Account Name | Billing State/Province | Type | Rating | Last Modified Date | Upsell Opportunity | Industry |
|---|---------------|---------------|---------------------------------|------------------------|------|--------|--------------------|--------------------|------------|
| 1 | - | - | Express Logistics and Transport | - | - | - | 13/03/2020 | - | Technology |

Resulting Output Excel file (ReportOutput Example.xlsx):

The screenshot shows an Excel spreadsheet with the following content:

| Last Activity | Account Owne | Account Name | Billing State/Province | Type | Rating | Last Modified Date | Upsell Opportunity | Industry |
|---------------|--------------|---------------------------------|------------------------|------|--------|--------------------|--------------------|------------|
| | | Express Logistics and Transport | | | | 13/03/2020 | | Technology |
| Total | Count | 1 | | | | | | |

Additional text in the spreadsheet includes: 'Accounts Report Test', 'As of 2020-03-13 13:34:26 Fuso horário de Brasília/BRT • Generated by', 'Filtered By', 'Show: My accounts', 'Date Field: Created Date equals Custom (06/03/2020 to null)', 'Confidential Information - Do Not Distribute', and 'Copyright © 2000-2020 salesforce.com, inc. All rights reserved.'



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 - Report Exporter to Excel*.



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