helpsystems

SALESFORCE BOT

REPORT EXPORTER TO EXCEL

Content

Overview

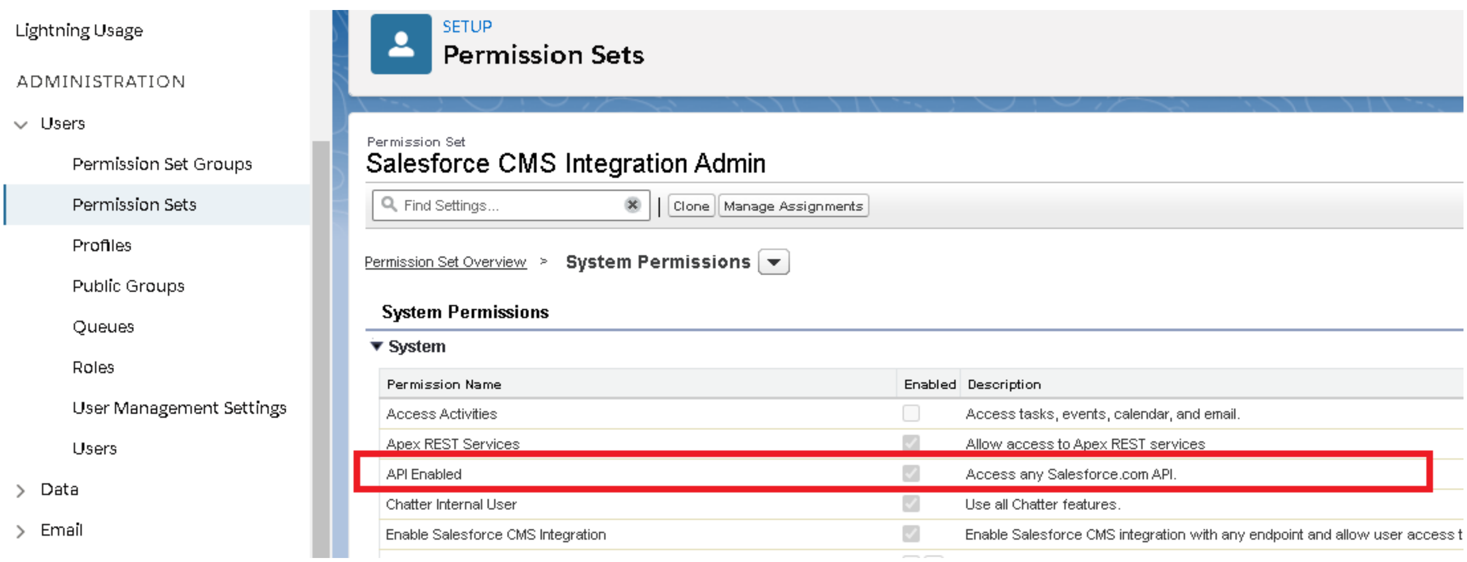
This how to guide introduces the *Salesforce Bot - Report Exporter to Excel*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which greatly 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.

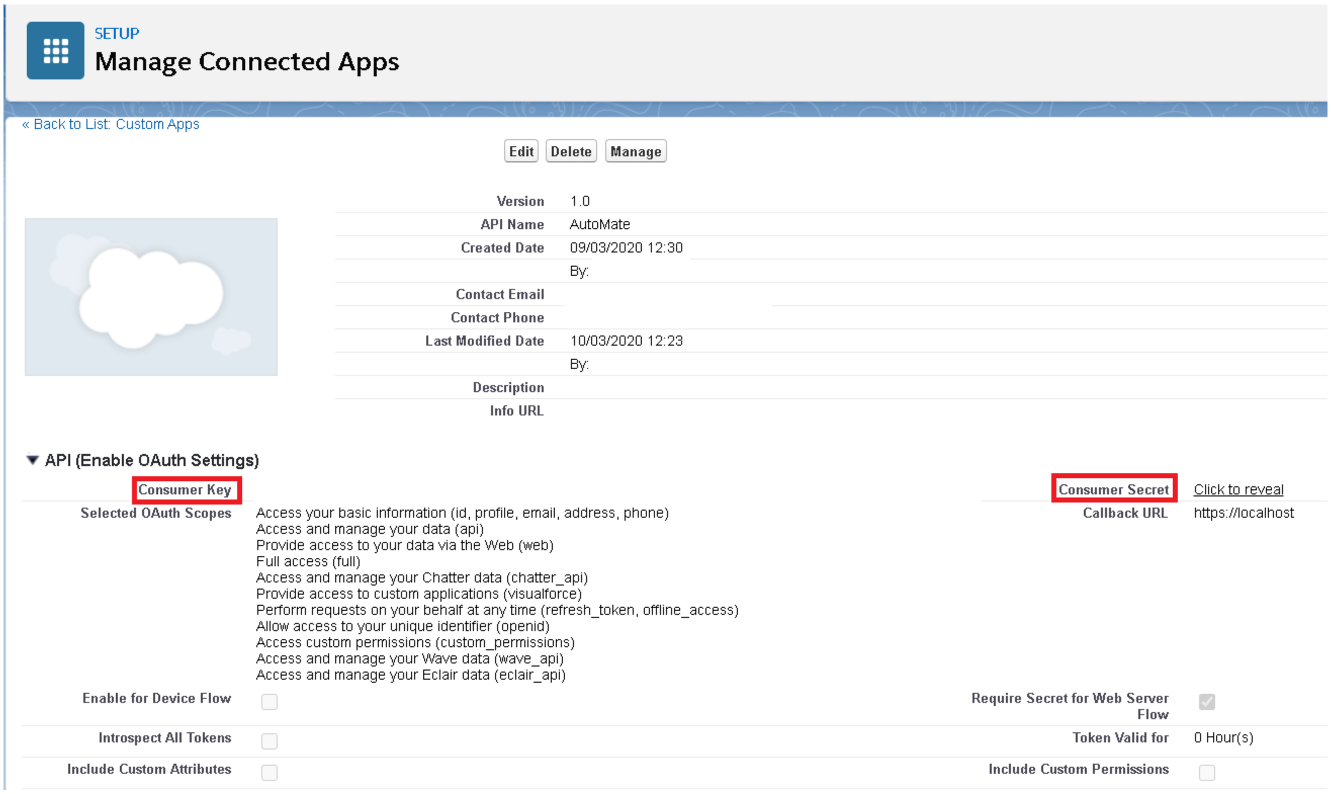
There is also available a *Salesforce Bot - Generate Connection Token* that will provide you an easy way to create the Token needed for this bot to work.

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:



- ○ 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:



- ○ 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.

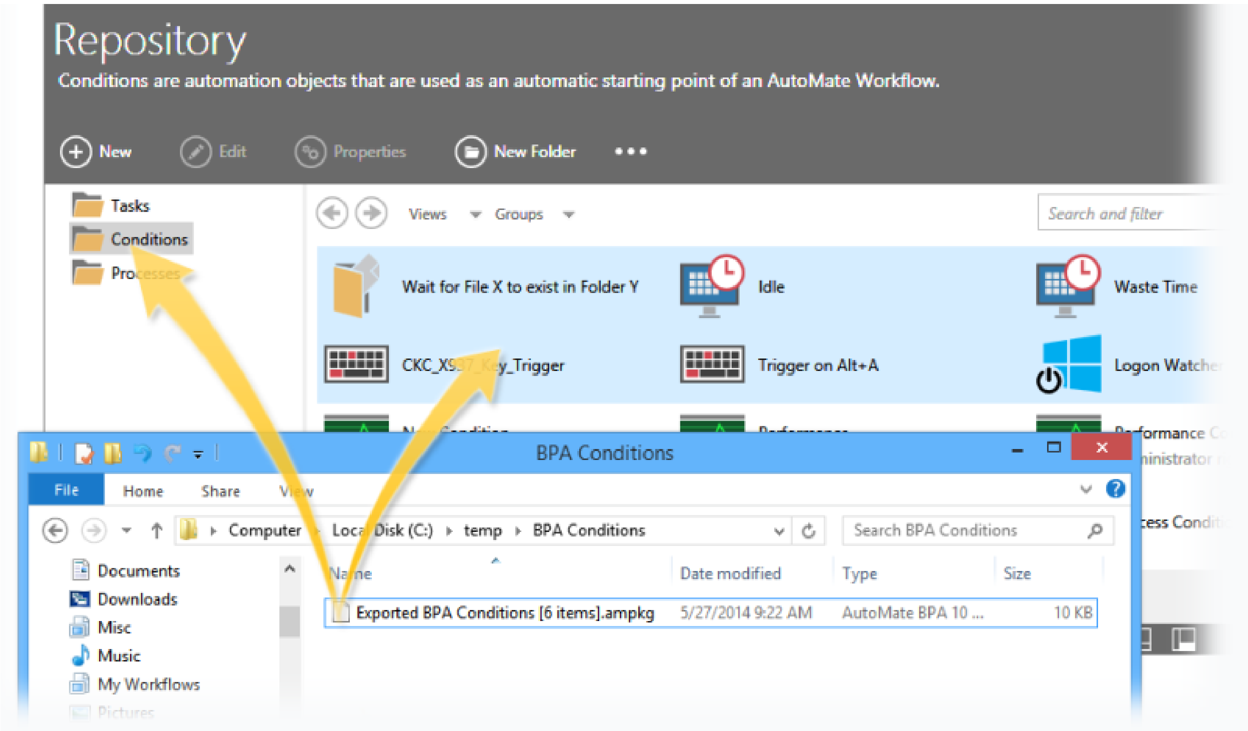
- Automate constants to be Close to set the Salesforce connection values:
  - ○ const_SalesForceURL: Salesforce URL for connection. It represents your Salesforce instance.
  - ○ const_SalesForceToken: Salesforce Token to execute the connection/request with. It can be set to the token value itself or 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.

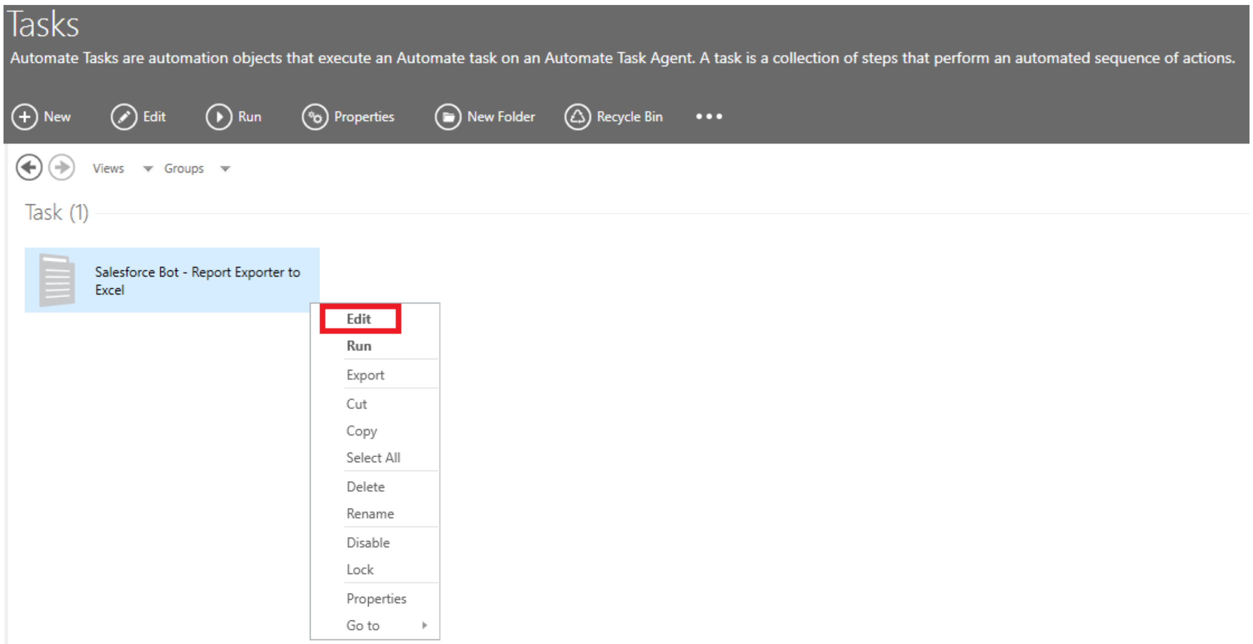


How to execute the Salesforce Bot - Report Exporter to Excel

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



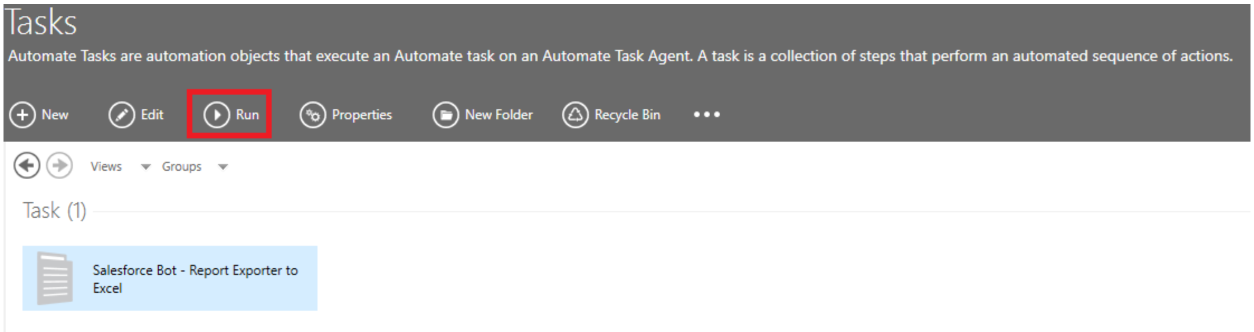
For step 2 edit the next variables according to your desired output:

- 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>>.

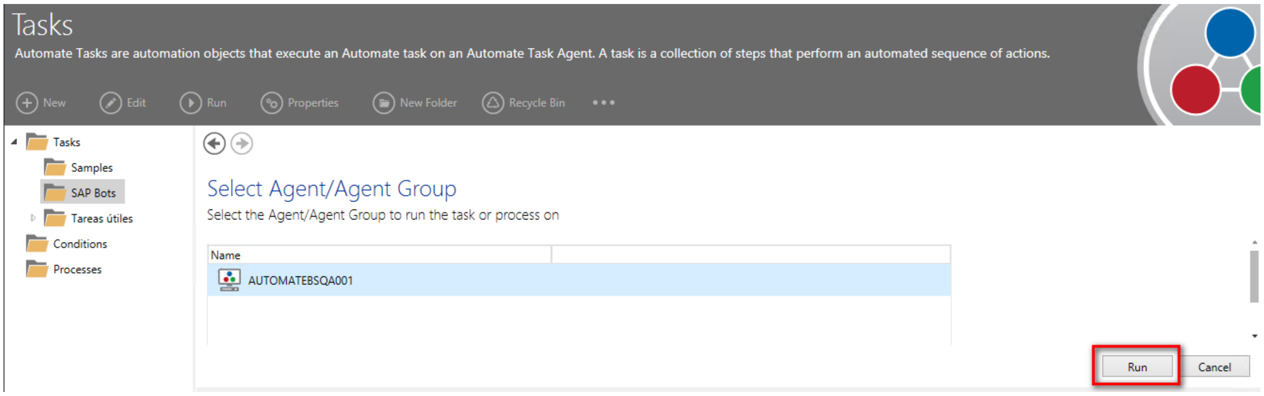
  Example: ***"C:\Automate\Tasks\Salesforce Bot - Report Exporter to Excel"***

Save and close the task

Select the task and click on Run

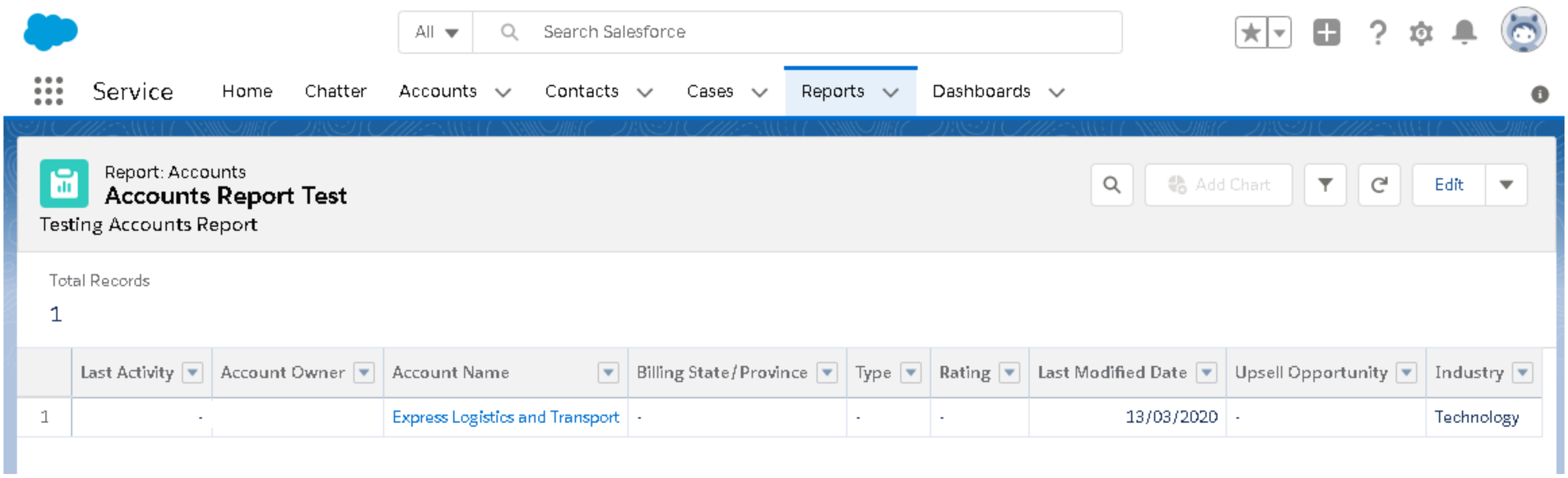


Select your Agent and click on Run again

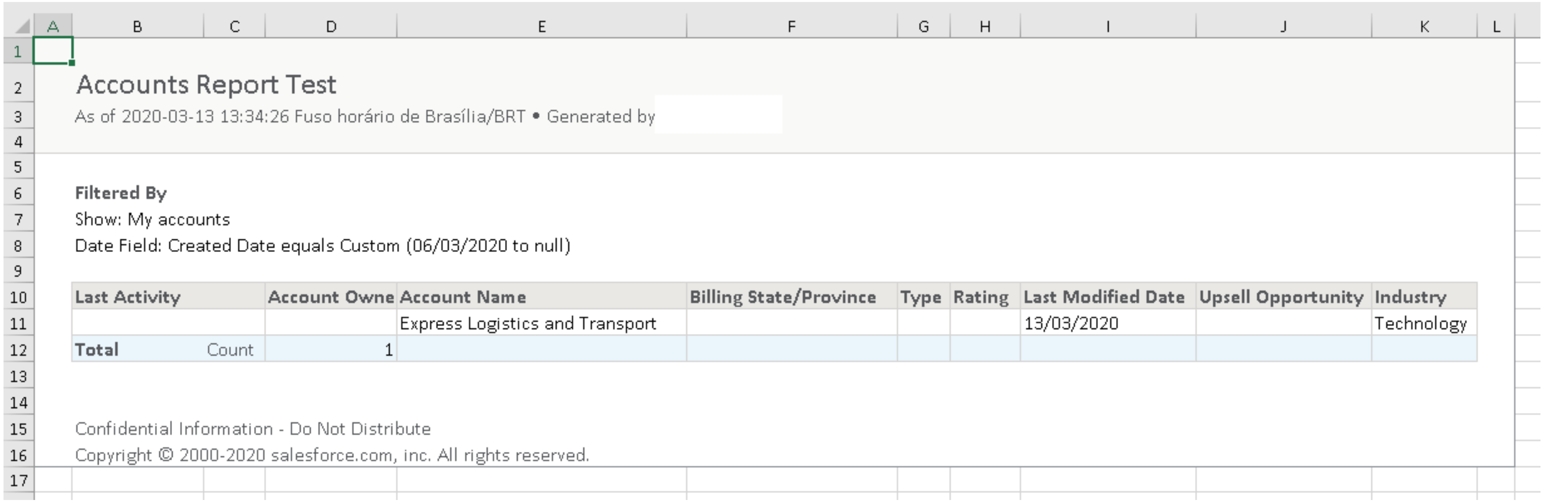


Appendix A – Salesforce Report View and Excel Output Example

Report in Salesforce:



Resulting Output Excel file (ReportOuput Example.xlsx):



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)

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							

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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.*