



Salesforce Contact Entry Readme

Version 1.0
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1. Introduction

This document contains all essential information for the user to make full use of this Enterprise A2019 Bot. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

The Salesforce Contact Create Bot can be used to automatically create contacts in Salesforce.

1.2 Usecases

The key use case for this bot is to create multiple contacts in Salesforce from customer information contained in an Excel spreadsheet.

2. Before You Start

2.1 Files Needed

Download the following file that you may need to use with your bot:

1. Sample Customer List:

<https://botcenter.automationanywhere.com/assets/samplecustomerlist.xlsx>

2.2 Prerequisites

This Bot utilizes Enterprise A2019 and an Excel file to create the contacts in Salesforce. All contacts are created in a fictitious customer account called Cosign. Either the Cosign account must be added to Salesforce or the Excel file must be edited to use an existing account in Salesforce.

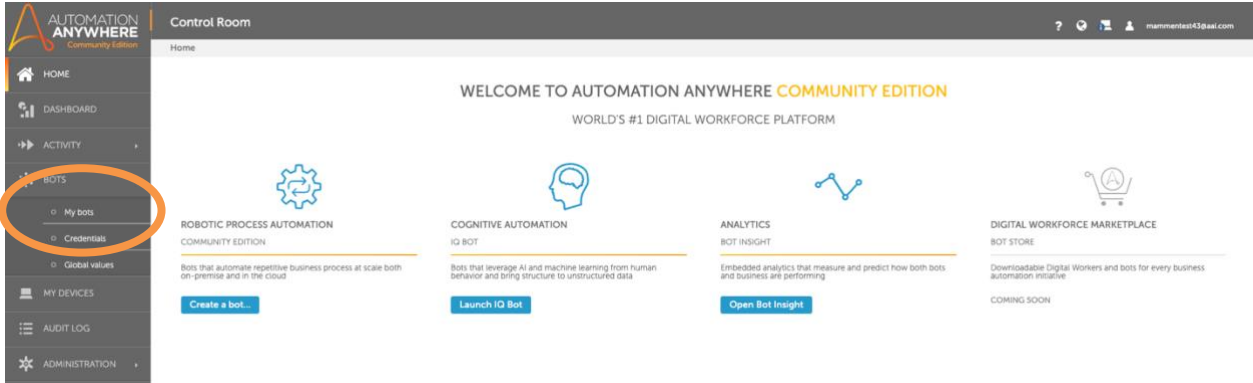
The following are required:

- A Salesforce Classic account and login (logged in using Internet Explorer)
- The Google Chrome browser on bot runner machine
- Internet Explorer on bot runner machine (for Salesforce)
- The samplecustomerlist.xlsx Excel file installed in C:\Covid-19

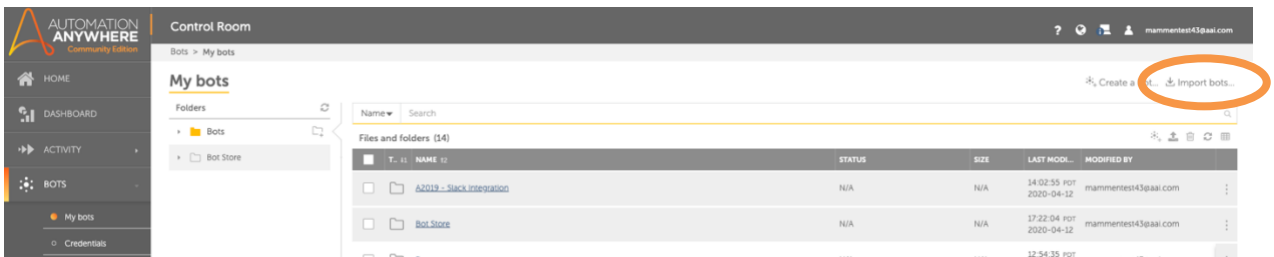
3. Getting Started

3.1 Import Bot

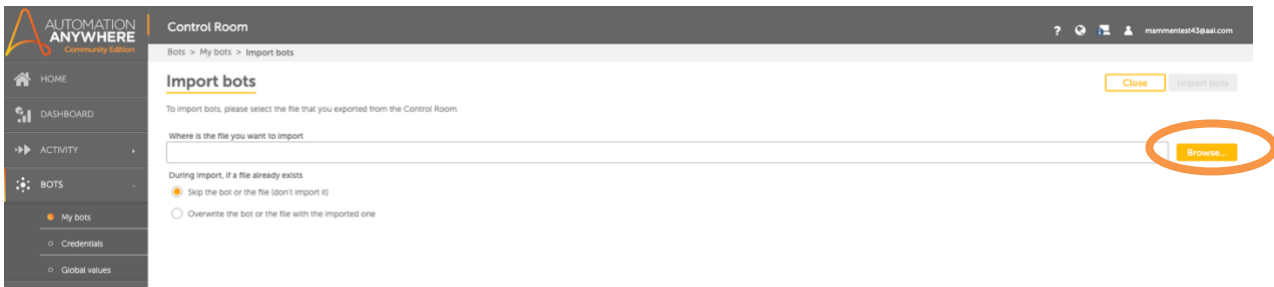
1. Download the *Salesforce Contact Entry* bot from the [Community Edition Bots page](#) to your computer.
2. Launch the Community Edition Control Room by logging into your Community Edition account.
Note: If you do not have a Community Edition account, sign up [here for free](#).
3. Navigate to **My Bots** by clicking **Bots** in the left panel and then select **My Bots**:



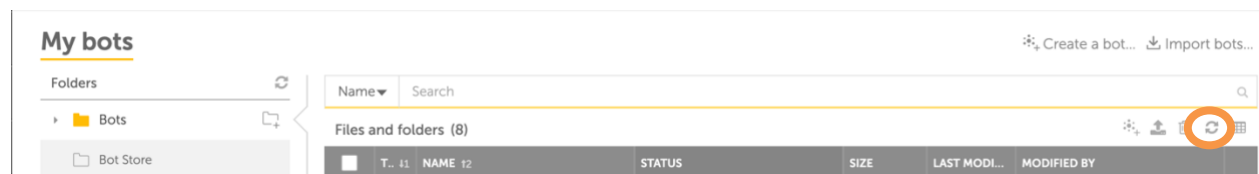
4. Click Import Bots:



5. Click Browse and select the Bot you would like to import:



6. Refresh the bot list by clicking on the "Refresh table" button to access the newly imported bot.



3.2 Setup

- **Salesforce Login**

The user who invokes the A2019 Salesforce ContactCreate Bot must have already logged into Salesforce in Classic Mode using Internet Explorer and must have clicked the “Home” tab prior to running the bot, so that the ContactCreate Bot may create the contacts.

- **Chrome Browser**

This Bot operates with the Chrome browser. This must be installed on the bot runner machine but the Salesforce Login specified above must happen in the Internet Explorer browser for the contact creation to work properly.

- **Internet Explorer Browser**

The Bot assumes that the Salesforce Login specified above must happen in the Internet Explorer browser for the contact creation to work properly.

3.3 Configuration and Use

Perform the following prior to running the bot:

- Copy the samplecustomerlist.xlsx to the Windows directory C:\Covid-19 prior to running the bot. Excel is not required to be installed on the bot runner machine. Only the file is required.
- Create a customer Account in Salesforce for a fictional company called Cosign in order to match the company name in the Excel file. Or optionally, the user can change the company name in the Excel file to match an existing Account in Salesforce.
- User must be logged into Salesforce (Classic Mode) using Internet Explorer and must click the “Home” tab to initialize the starting point of the bot.

4. System Requirements

Below are the minimum system requirements for running bots as an Enterprise A2019 (cloud-deployed) or Community Edition user on your local machine.

Hardware Requirements

Device	Processor	RAM	Storage (Free Space)	Network
Machine	Intel Core i5 2.6 GHz	4 GB minimum 8 GB recommended	32 GB	1 GbE
Bot Creator and Bot Runner	No additions to the machine requirements	No additions to the machine requirements	Add 100 through 150 KB per Automation Anywhere script Add 40 through 50 GB per long-term project	No additions to the machine requirements

Browser Requirements

The user interface for Automation Anywhere Enterprise is through a browser. Login to your device then login to Enterprise Control Room through a browser.

Browser	Browser Version	Automation Anywhere plug-in version ²	Supported bot functions by Bot agent version		
			2.0.2	1.0.2	1.0.1
Google Chrome ¹	57 or later	11 or 12	2.0.2	1.0.2	1.0.1
Microsoft Internet Explorer	11	N/A	None	Debugger only	All except Credential Vault

(1) Google Chrome re-verification

CAUTION: Google Chrome requires re-verification of permissions when the Automation Anywhere Google Chrome extension (Version 11.3.3 or later) is updated. If prompted, click **Enable this item** in the Google Chrome message. Alternatively, re-enable the extension through [chrome.web store](#). Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.

(2) Google Chrome plug-in versions

A2019 supports Chrome plug-in version 11. If you have other versions installed, you might not be able to record tasks using the **Record** feature or **Capture** action. To resolve this issue, do the following:

1. Rename the automation.chrome.agent registry key to automation.chrome.agent.old. The registry key is available at: Computer\HKEY_CURRENT_USER\Software\Google\Chrome\NativeMessagingHosts
2. Disable all other Google Chrome

5. Support & FAQs

5.1 Support

Free bots are not officially supported by Automation Anywhere. You can get access to Community Support through the following channels:

- Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#).
- Automation Anywhere's [Product Documentation portal](#), which can be accessed for more information about our products and guidance on [Enterprise A2019](#)

5.2 FAQs

Q: Can I make changes to this bot?

A: Absolutely. Free bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

For questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#)

Appendix A: References

No.	Topic	Reference Link
1	Overview of Enterprise A2019	Click here
2	Guidance: Building basic A2019 bots	Click here
3	Guidance: Building A2019 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here