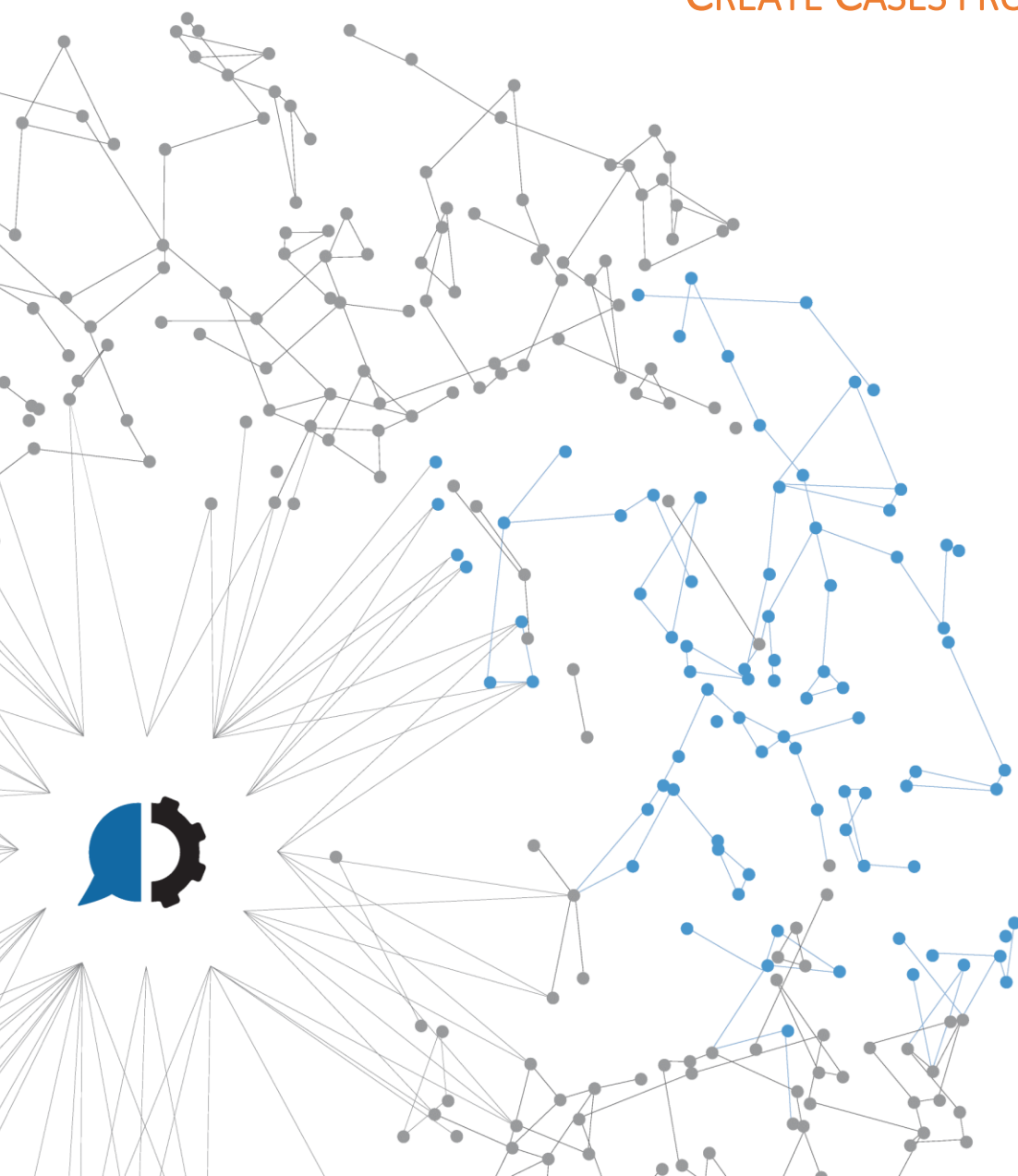




# SALESFORCE BOT

CREATE CASES FROM EXCEL INPUT





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## OVERVIEW

This how to guide introduces the *Salesforce Bot - Create 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 reports generation, file movement, data import and export, and scheduling batch processing.

***Salesforce Bot - Create Cases from Excel INPUT*** is based in the Salesforce REST API. It creates 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 when necessary a 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

SETUP  
Permission Sets

Permission Set  
Salesforce CMS Integration Admin

Find Settings... Clone Manage Assignments

Permission Set Overview > System Permissions


System Permissions

System

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 create a connected application in this [link](#). Once you create 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**

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)

☐

Enable for Device Flow

☐

Introspect All Tokens

☐

Include Custom Attributes

**Consumer Secret**

[Click to reveal](#)

Callback URL <https://localhost>

☒

Require Secret for Web Server Flow

Token Valid for

0 Hour(s)

☐

Include Custom Permissions

- **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 that it is also available a **SALESFORCE BOT - GENERATE CONNECTION TOKEN** that will provide you an easy way to create when necessary a token for this bot to work.
- **Salesforce API Version:** This bot was create using the v48.0 API.
- **Automate constants to be created 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 or the path in which the .txt file with the token inside is located. Example: C:\Automate\SalesForceToken.txt

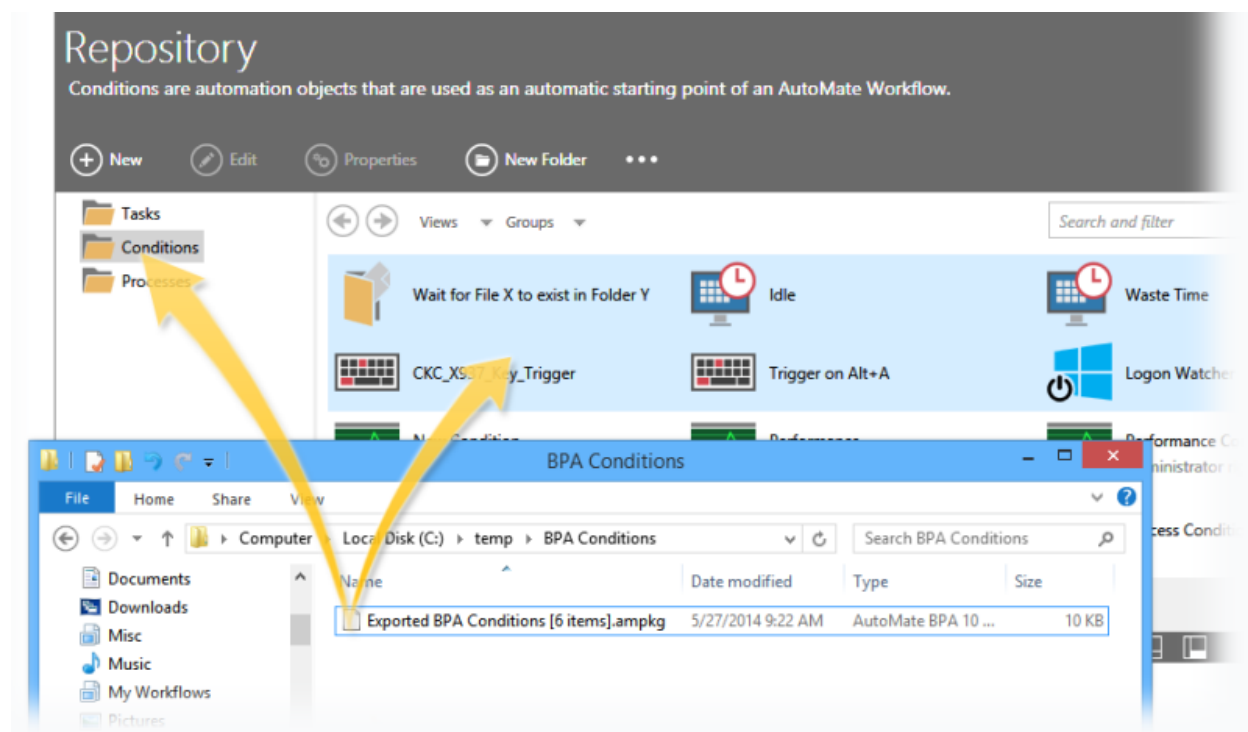


## HOW TO IMPORT AN AUTOMATE TASK

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

### *The Salesforce create case screen:*

New Case

Case Information

Case Owner  
JOSE GARAY

Case Number

Contact Name  
Search Contacts...  
Q

Account Name  
Search Accounts...  
Q

Type  
--None--  
▼

Case Reason  
--None--  
▼

\* Status  
New  
▼

Priority  
Medium  
▼

\* Case Origin  
--None--  
▼

Web Information

Web Email

Web Company

Web Name

Web Phone

Additional Information

Product

Engineering Doc Number

☐ Send notification email to contact

Cancel

Save & New

Save



### The Excel INPUT file

A	B	C	D	E	F	G	H	I	J
SalesForce - Case Fields							Opened?	Result Details	
Status (Status "New" or "Escalated". If blank, will be created as New)	Subject	Description	Type	Priority Possible values: "High", "Medium", "Low"	Reason	Origin	Yes/No	Date	Case Numer and ID / Message

#### NOTES:

- All the cases will be created with State **"New"** if the field is left blank.
- **Red fields** are mandatory.
- **If one of the non-mandatory fields is not defined in your Salesforce instance, leave them blank.**
- Columns H to J in the INPUT file will be filled with the result of the execution and the case number and ID that was opened. See [APPENDIX A](#) for an example on the resulting.

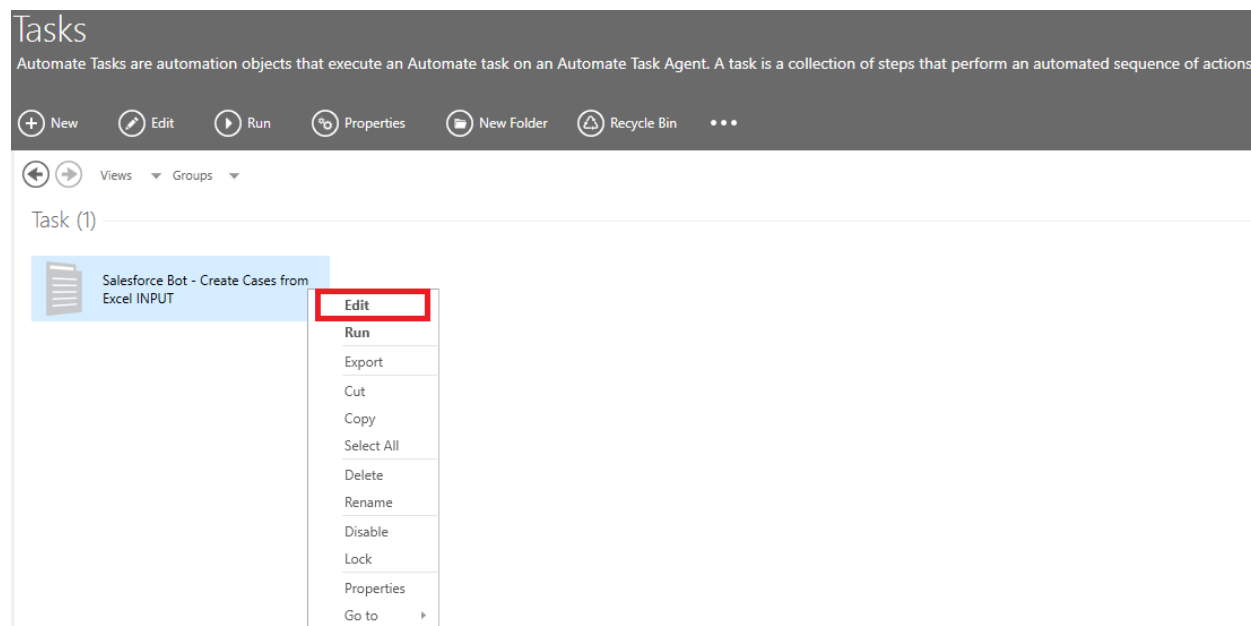




If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



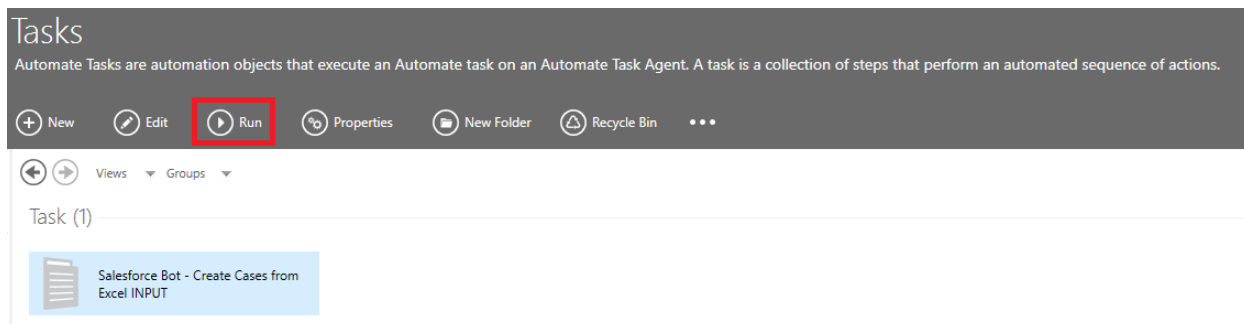
From [step 2](#) edit the next variables according to you desired output:

- [var\\_ExcelInputFile](#): The complete path and filename of the Salesforce Open Cases INPUT.xlsx.  
Example: ***"D:\Automate\SalesForce Open Cases INPUT.xlsx"***

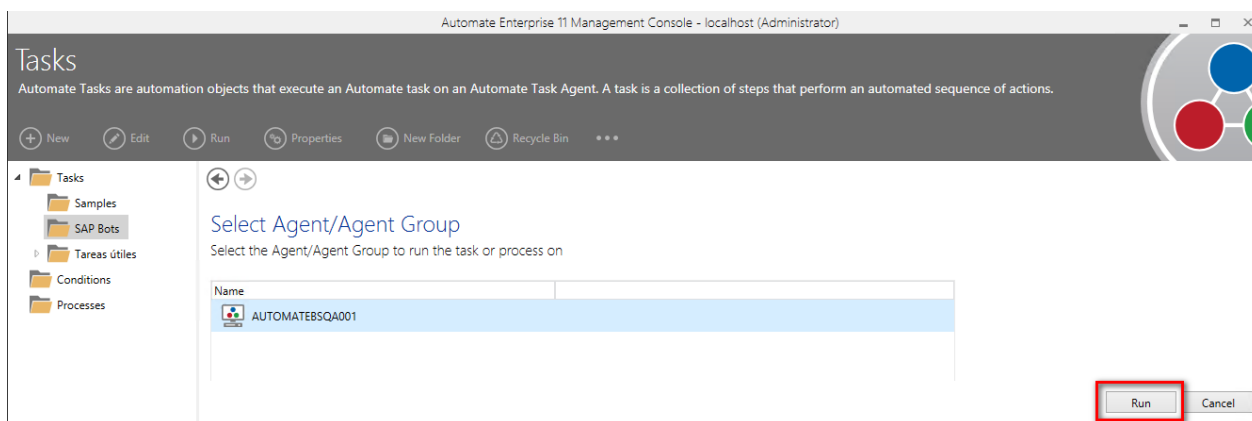
[Save and close](#) the task



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							H	I	J
Status (Status "New" or "Escalated". If blank, will be created as New)	Subject	Description	Type	Priority Possible values: "High", "Medium", "Low"	Reason	Origin	Opened?  Yes/No	Date	Result Details  Case Number and ID / Message
New	Automate Test1	Automate Test1	Other	Low	Feedback	Web	YES	17/03/2020 11:56:22 AM	00001037 (Id=5006g00000C3yULAAZ)
New	Automate Test2	Automate Test2	Mechanical	High	Equipment Design	Web	YES	17/03/2020 11:56:28 AM	00001038 (Id=5006g00000C3yUQAAZ)
New	Automate Test3	Automate Test3	Other	Low	Feedback	Web	YES	17/03/2020 11:56:33 AM	00001039 (Id=5006g00000C3yLVAAZ)

Note that the execution result is written from column H to J. Column J will have the Case number and ID of the case created in Salesforce.

Salesforce cases view result:



All Search Cases and more...

Service Home Chatter Accounts Contacts Cases Reports Dashboards

Cases

My Open Cases

3 items • Sorted by Case Number • Filtered by my cases • Closed • Updated 19 minutes ago

	Case Number ↑	Contact Name	Subject	Status	Priority	Date/Time Opened
1	00001037		<a href="#">Automate Test1</a>	New	Low	17/03/2020 11:56
2	00001038		<a href="#">Automate Test2</a>	New	High	17/03/2020 11:56
3	00001039		<a href="#">Automate Test3</a>	New	Low	17/03/2020 11:56



## 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 - Create Cases from Excel INPUT*.



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