HUBSPOT BOT

CLOSE TICKETS FROM EXCEL INPUT

Content

OVERVIEW

This how to guide introduces the *HubSpot Bot - Close Tickets 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.

HubSpot Bot - Close Tickets from Excel INPUT is based in the HubSpot REST API, specifically the **Tickets API**. It closes tickets in HubSpot and updates the Input Excel file with the result of the execution. Check carefully the PREREQUISITES and the HOW TO GENERATE THE INPUT FILE sections to get detailed information.

There is also available a *HUBSPOT BOT - GENERATE CONNECTION TOKEN* that will provide to you an easy way to create—when necessary—a token for this bot to work. Remember that the token by default expires every 6 hours.

- **Automate:** The HubSpot bot depends on Automate software in order to work. The minimal supported versions are:

  o **Automate Ultimate 11.2**

  o **Automate Plus 11.2**

  o **Automate Desktop 11.2**

- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps our HubSpot bot performs

- **HubSpot:** Our minimal requirements are

  o **HubSpot REST API Enabled:** It is enabled by default.

  o **HubSpot REST API – Connected App Created and OAuth Enabled and Token generated:** You can check the HubSpot documentation on how to create a connected application in this link and the procedure on how to configure the OAuth in this link. Within this procedure you will be able to obtain the connection token that's needed for this bot to operate. Remember that the token by default expires every 6 hours.

  o **HubSpot connected application Ticket Scope:** It is important that the necessary scopes are selected when configuring the connect application. This will permit the execution of the crm-objects/objects/tickets API from this Automate HubSpot bot.

- Automate constants to be created to set the HubSpot connection values:

  o const_HubSpotURL: HubSpot URL for connection. Example: ***https://api.hubapi.com***

  o const_HubSpotToken: HubSpot 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\HubSpotToken.txt

  In the case of using a .txt file, the token must have the following format/structure:
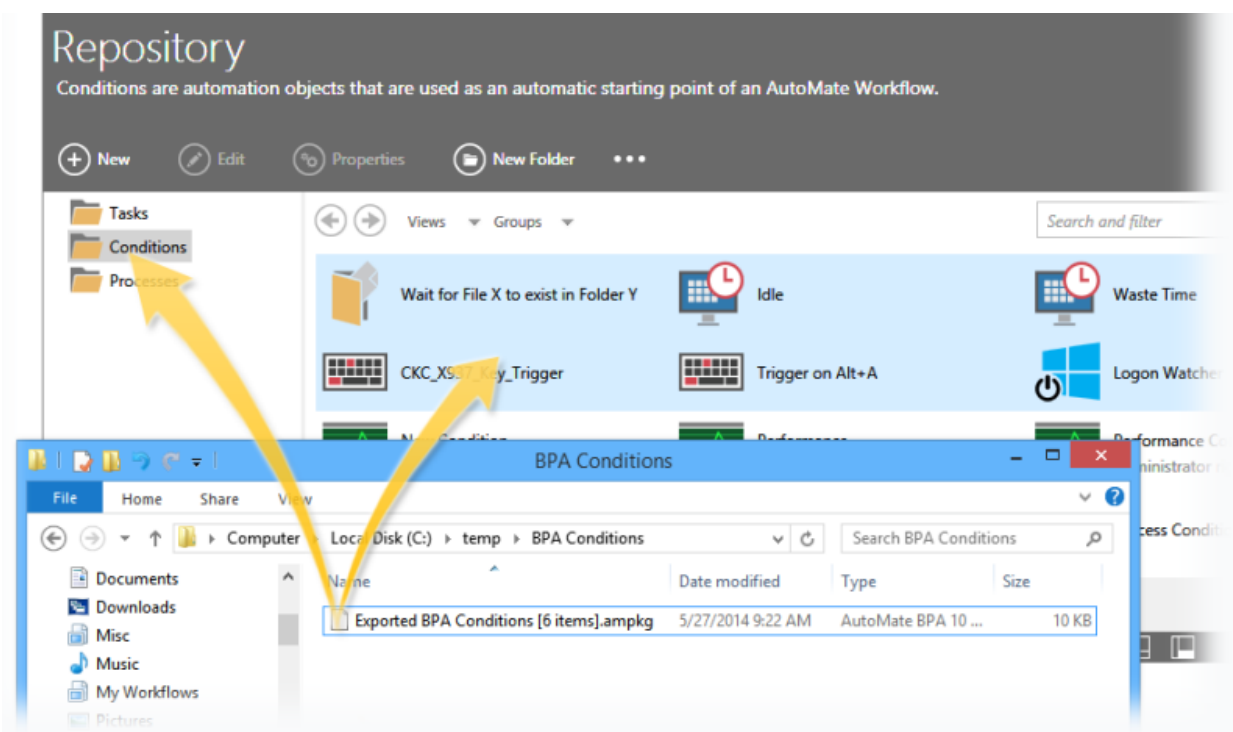
  access_token:TokenString

  Example:

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 *"HubSpot Close Tickets INPUT.xlsx"* shipped with this HubSpot 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	HubSpot - Ticket Fields. It will be closed with Status "Closed (4)"		Closed?	Result Details	
2	Ticket ID	NOTE (to be added to the Ticket when closed)	Yes/No	Date	Message

NOTES:

- *All fields* are mandatory (Columns A and B).

- A note will be added to the Ticket before changing its status.

- Columns C to E in the INPUT file will be filled with the result of the execution. See APPENDIX A for an example on the results.
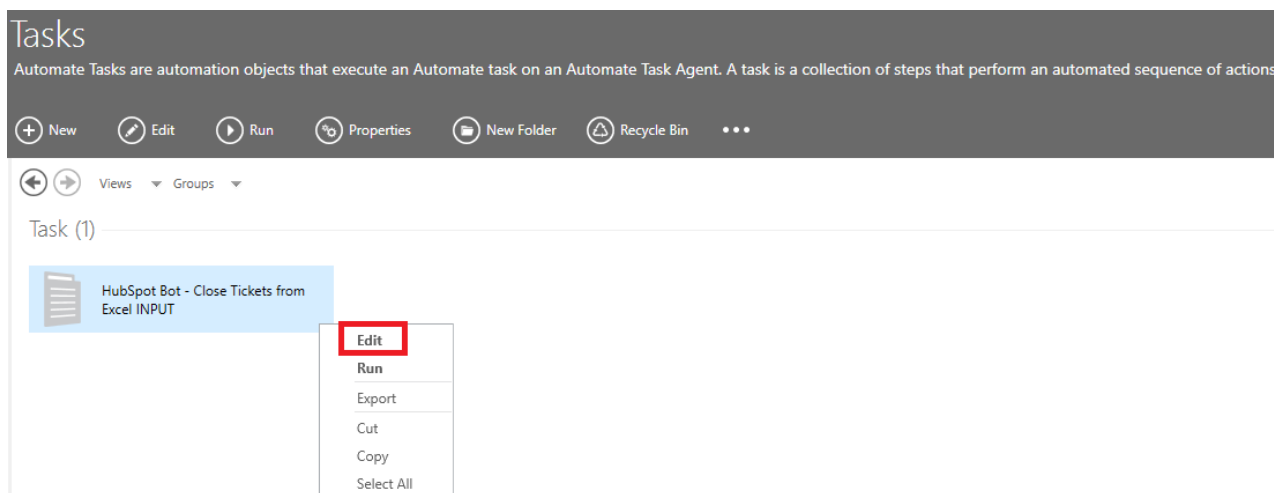
How to execute the HubSpot Bot - Close Tickets from Excel INPUT

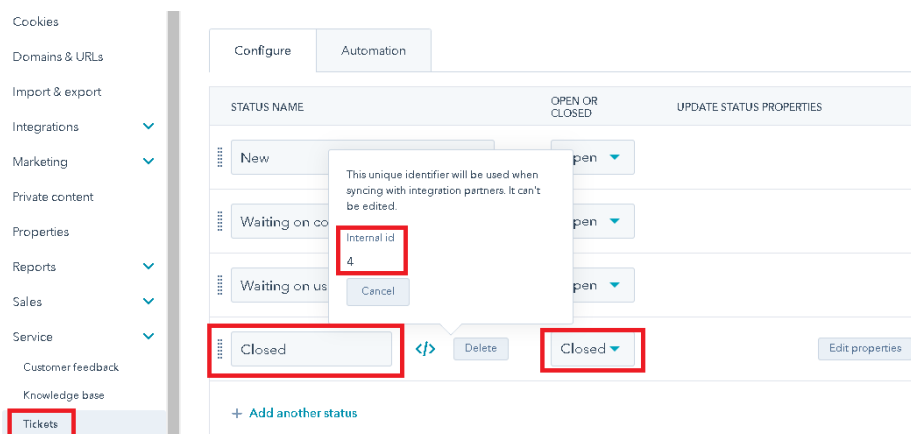If this is the first time running this task, we will need to set some parameters

Open the Server Management Console and locate the imported task

Edit the imported task by right clicking on the task and selecting edit

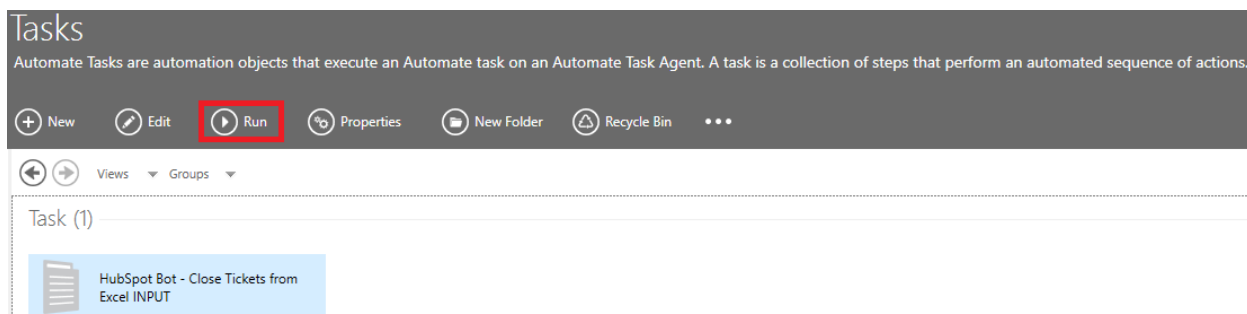From step 4 edit the next variables according to you desired output:

- var_ExcelInputFile: The complete path and filename of the HubSpot Close Tickets INPUT.xlsx

  Example: *"D:\Automate\HubSpot Close Tickets INPUT.xlsx"*

- var_PipelineStageID: The Pipeline Stage ID represents the ID of the Status in HubSpot. By default, the Stage "Closed" is represented by the **ID "4"**. *In case of a customize configuration, you must change it to the corresponding ID.* You can check the Pipeline Stage ID in the HubSpot Ticket configuration:
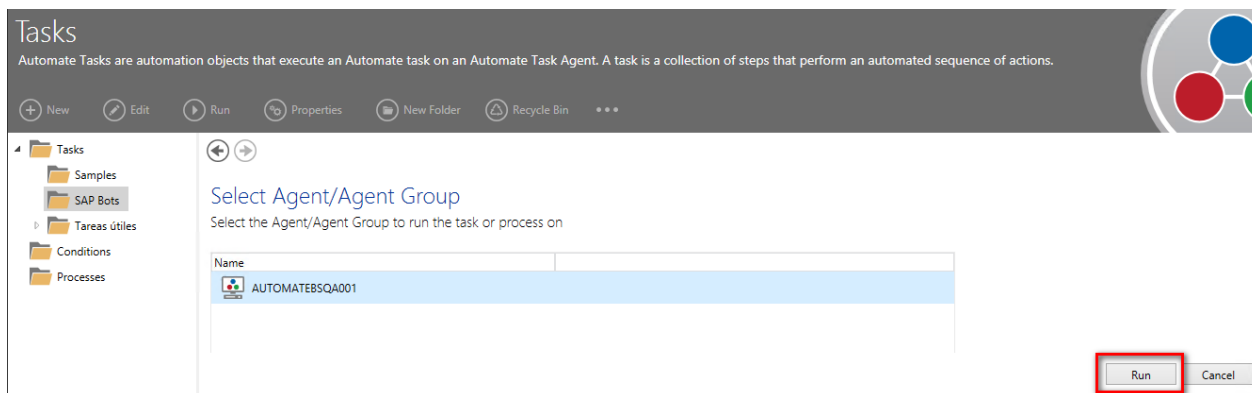

Save and close the task

Select the task and click on Run

Select your Agent and click on Run again

INPUT Excel file with results:

	A	B	C	D	E
1	HubSpot - Ticket Fields. It will be closed with Status "Closed (4)"		Closed?	Result Details	
2	Ticket ID	NOTE (to be added to the Ticket when closed)	Yes/No	Date	Message
3	109739402	Closed by Automate HubSpot Bot	YES	26/03/2020 5:13:23 PM	The ticket was closed.
4	109739403	Closed by Automate HubSpot Bot	YES	26/03/2020 5:13:25 PM	The ticket was closed.
5	109731795	Closed by Automate HubSpot Bot	YES	26/03/2020 5:13:27 PM	The ticket was closed.

Note that the execution result is written from column C to E.

HubSpot tickets view result:

- 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 *HubSpot Bot - Close Tickets from Excel INPUT.*