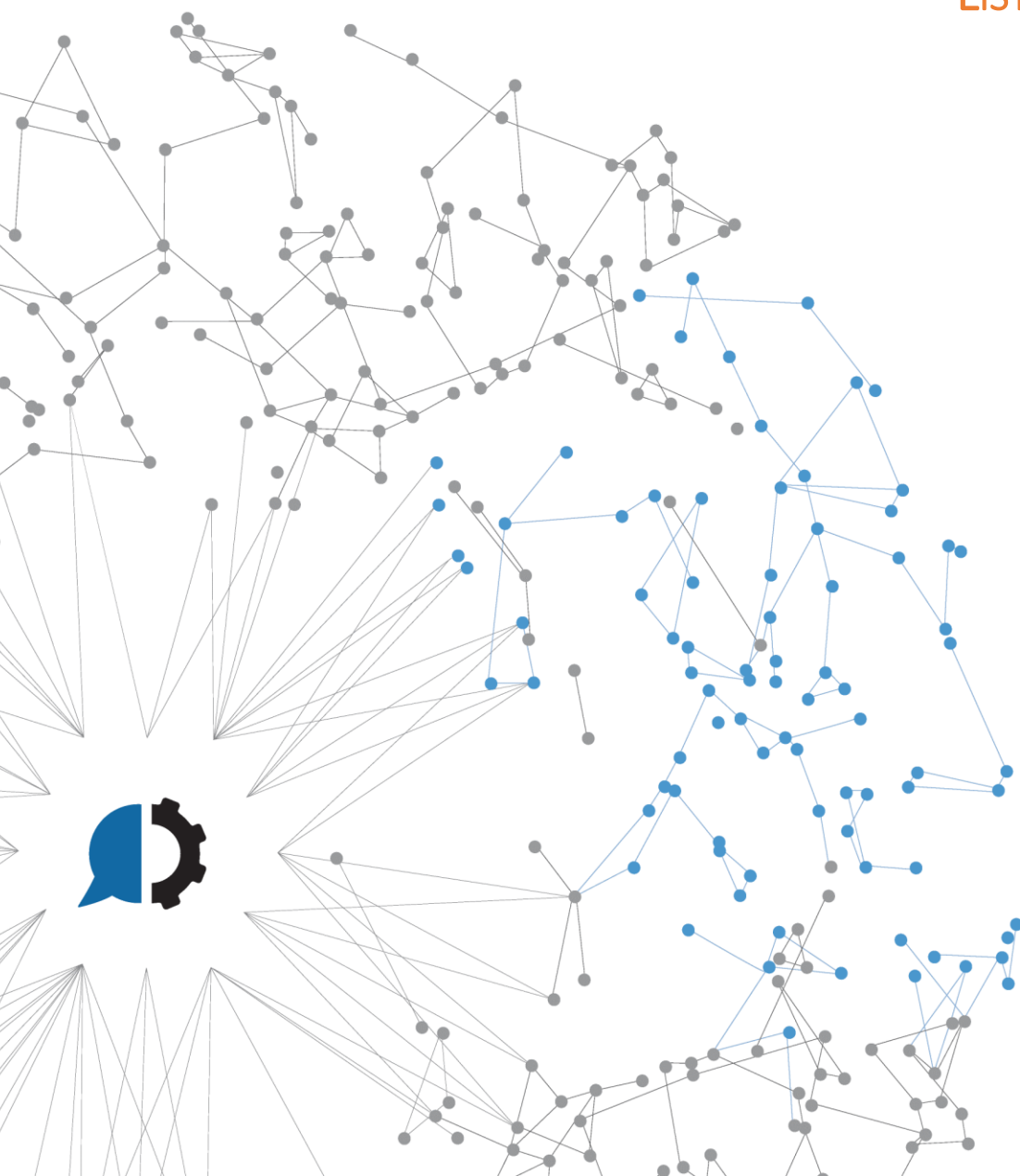




SALESFORCE BOT

LIST CASES TO EXCEL





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OVERVIEW

This how to guide introduces the *Salesforce Bot - List Cases 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 - List Cases to Excel is based in the Salesforce REST API. It requests a list of cases to Salesforce and create an Output Excel file with the retrieve information. Look over the [PREREQUISITES](#) and the [HOW TO EXECUTE THE SALESFORCE BOT - LIST CASES TO EXCEL](#) sections to get detailed information.

The [SALESFORCE BOT - GENERATE CONNECTION TOKEN](#) is also available to provide you an easy way to create a necessary 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:

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with 'ADMINISTRATION' expanded, showing 'Users' and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the 'Salesforce CMS Integration Admin' permission set. Under 'System Permissions', a table lists various permissions. The 'API Enabled' row is highlighted with a red box.

| 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](#)



EditDeleteManage

| | |
|--------------------|------------------|
| 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

☐

Consumer Secret

Click to reveal

Callback URL

https://localhost

Require Secret for Web Server Flow

☒

Token Valid for

0 Hour(s)

Introspect All Tokens

☐

Include Custom Attributes

☐

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 a necessary 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

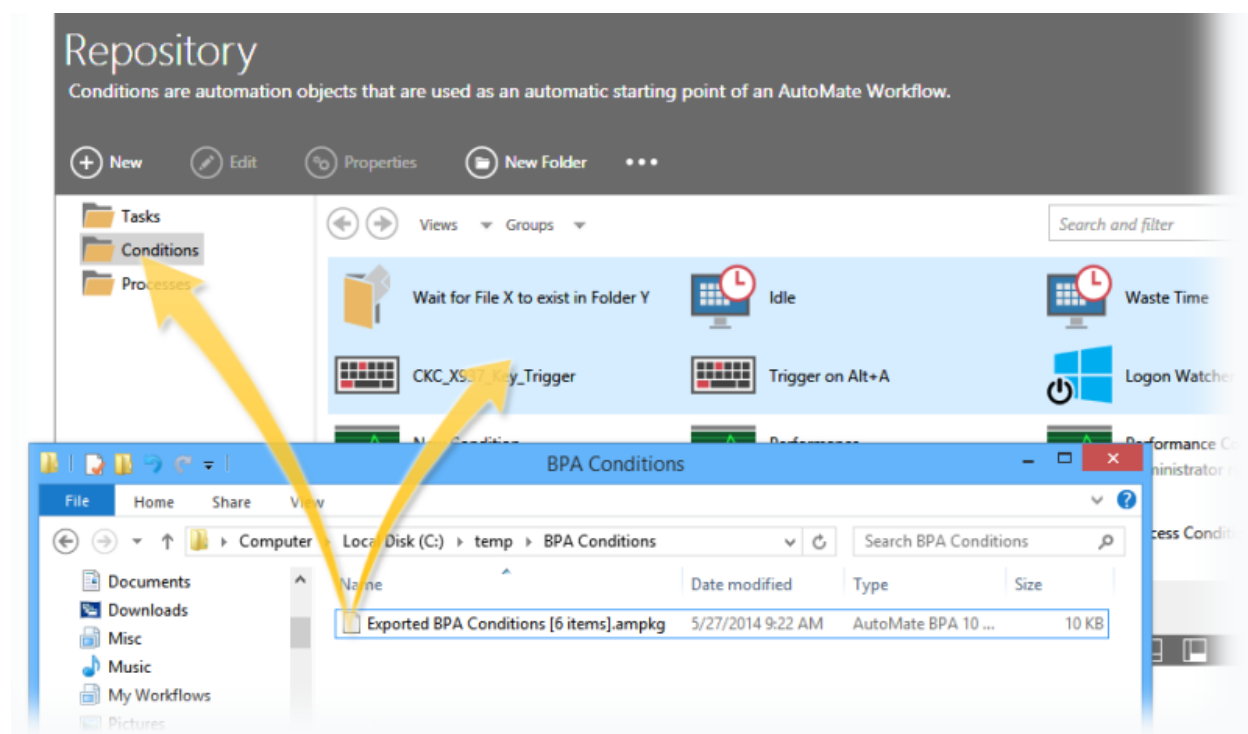


HOW TO IMPORT AN AUTOMATE TASK

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.



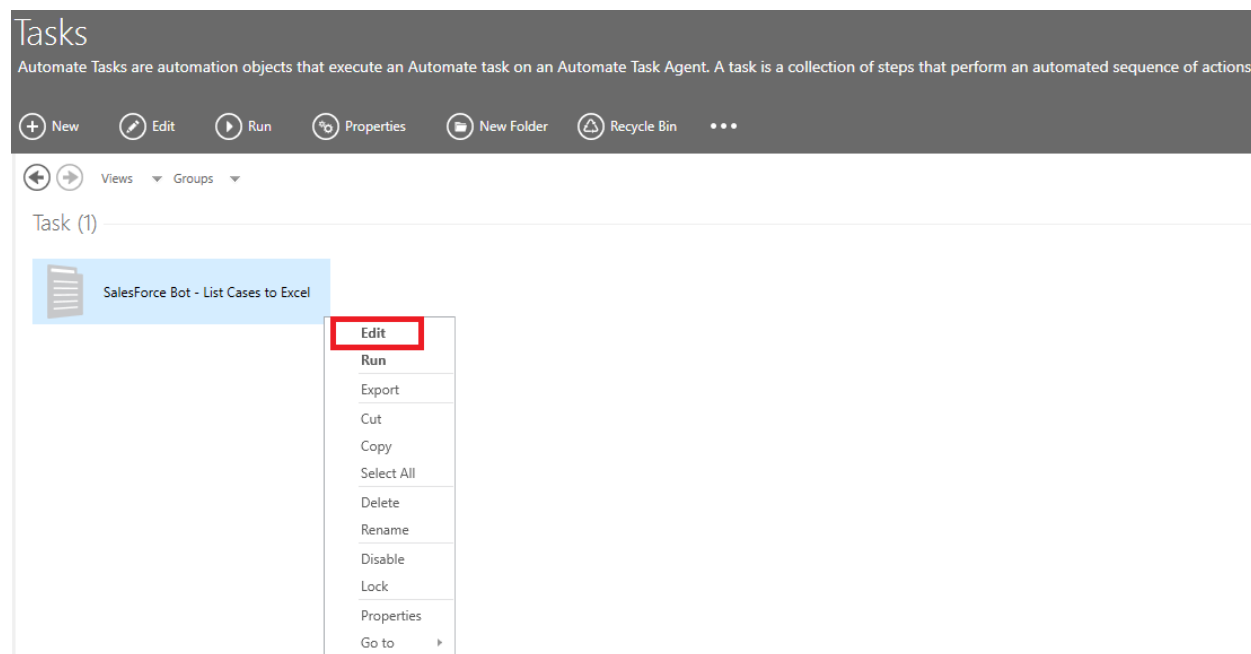


HOW TO EXECUTE THE SALESFORCE BOT - LIST CASES TO EXCEL

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](#)



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

- [var_CaseStatus](#): Status of the incidents to be retrieve. Possible values include: “New”, “Closed” or “Escalated”.
- [var_FromDaysBefore](#): From case create date. Number of back days to calculate the FROM date for list generation.

The output file will be automatically generated in the task folder with the next fields:

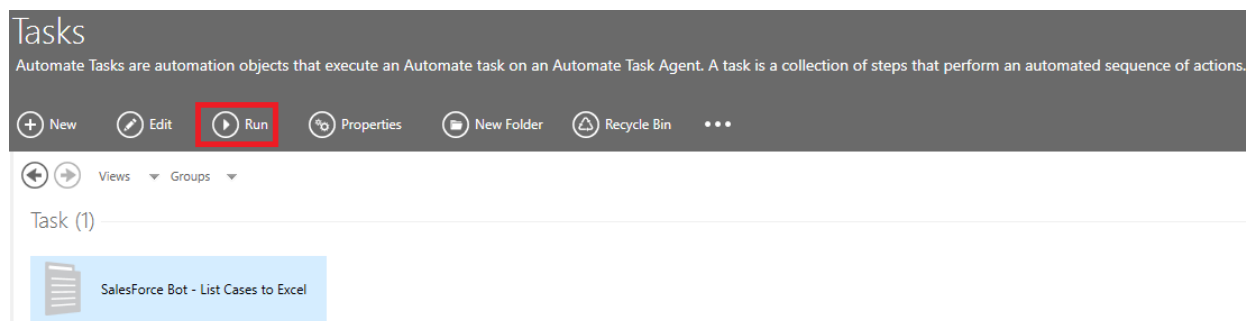
CaseNumber, Priority, Subject, Status, Type, Description, Reason, Origin, Owner, CreatedDate, Account, CreatedBy, IsEscalated, Contact, Id.

In case you don't have any of those fields defined in your Salesforce instance, please contact HelpSystems for support.

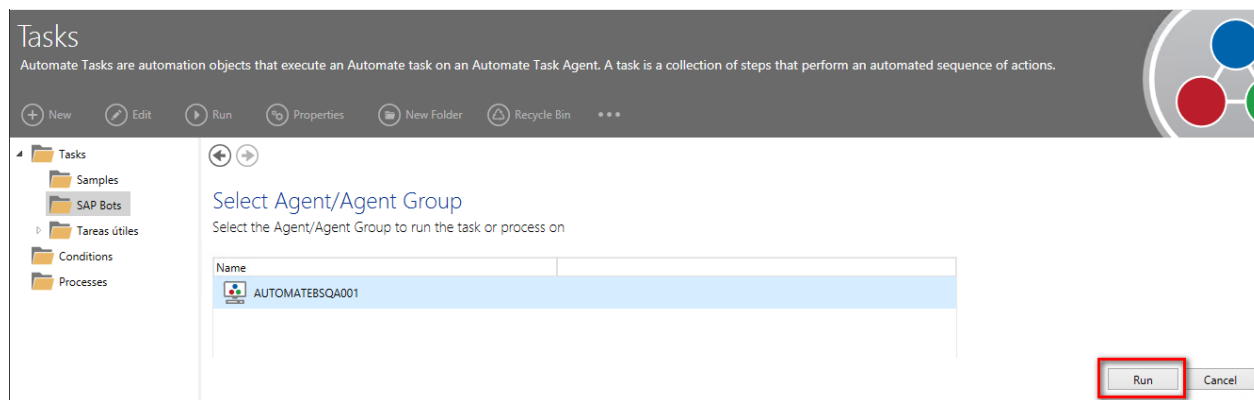
[Save and close](#) the task



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



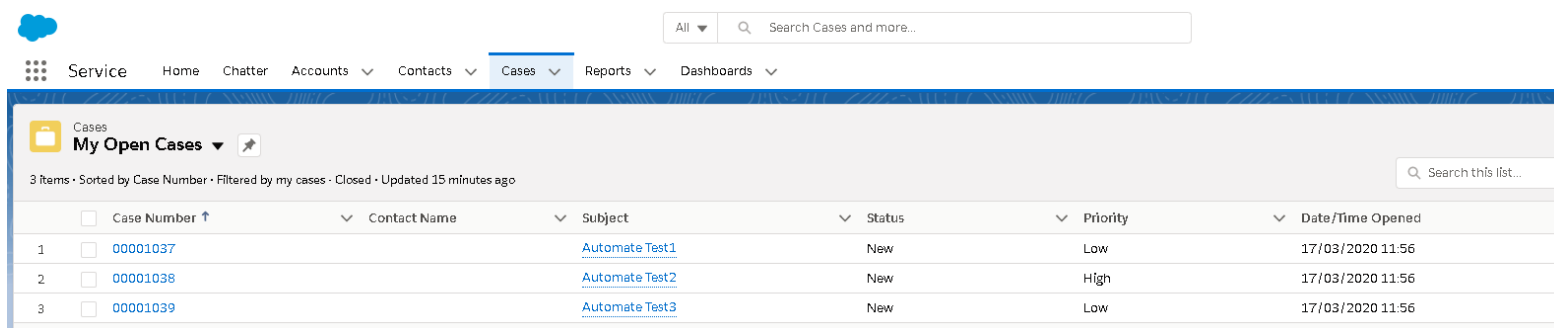
Select your [Agent](#) and click on [Run](#) again





APPENDIX A – SALESFORCE CASES VIEW AND EXCEL EXAMPLES

Salesforce cases view example:



The screenshot shows the Salesforce interface for the 'Cases' tab. The top navigation bar includes 'Service', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Cases', 'Reports', and 'Dashboards'. The 'Cases' tab is selected, showing 'My Open Cases' with 3 items. The table below lists the cases with columns for Case Number, Contact Name, Subject, Status, Priority, and Date/Time Opened.

| Case Number | Contact Name | Subject | Status | Priority | Date/Time Opened |
|-------------|--------------|----------------|--------|----------|------------------|
| 00001037 | | Automate Test1 | New | Low | 17/03/2020 11:56 |
| 00001038 | | Automate Test2 | New | High | 17/03/2020 11:56 |
| 00001039 | | Automate Test3 | New | Low | 17/03/2020 11:56 |

Resulting Excel file:

| | A | B | C | D | E | F | G | H |
|---|------------|----------|----------------|--------|------------|----------------|------------------|--------|
| 1 | CaseNumber | Priority | Subject | Status | Type | Description | Reason | Origin |
| 2 | 00001039 | Low | Automate Test3 | New | Other | Automate Test3 | Feedback | Web |
| 3 | 00001038 | High | Automate Test2 | New | Mechanical | Automate Test2 | Equipment Design | Web |
| 4 | 00001037 | Low | Automate Test1 | New | Other | Automate Test1 | Feedback | Web |

| | I | J | K | L | M | N | O |
|---|-----------------|------------------------------|---------|--|-------------|---------|--------------------|
| 1 | Owner | CreatedDate | Account | CreatedBy | IsEscalated | Contact | Id |
| 2 | Name=JOSE GARAY | 2020-03-17T14:56:29.000+0000 | | Name=JOSE GARAY: Username=jose.garay@helpsystems.com | False | | 5006g00000C3yUVAZ |
| 3 | Name=JOSE GARAY | 2020-03-17T14:56:23.000+0000 | | Name=JOSE GARAY: Username=jose.garay@helpsystems.com | False | | 5006g00000C3yUQAAZ |
| 4 | Name=JOSE GARAY | 2020-03-17T14:56:17.000+0000 | | Name=JOSE GARAY: Username=jose.garay@helpsystems.com | False | | 5006g00000C3yULAAZ |

SalesForceCases_12032020_143153.xlsx

File naming pattern:

SalesforceCases

Base Name

12032020

Represents the date of execution (ddMMyyyy)

143153

Represents the execution hour (Hmss)

Note: The output file will be created in the task folder: C:\Automate\Tasks\<<TASK NAME>>.



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 - List Cases to Excel*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people