

Automation Anywhere

RPA Bots for Salesforce Ver 3.0

April 2021

INSTALLATION & CONFIGURATION GUIDE



Table of Contents

Introduction	2
Installation and Configuration Sequence	3
Configure Automation Anywhere	3
Preinstallation in Salesforce	5
Creating a test environment using a Developer Trial Instance	5
Enable Lightning Experience	6
Set up a Custom Salesforce Domain	8
Installation in Salesforce	10
Installing the Automation Anywhere Package	10
Configure Automation Anywhere Package	12
Permission Sets	12
Remote Site Settings for different URI's	16
Automation Anywhere Setup	18
Bot Configuration	20
Object Selection and Input Field Mapping	21
Object Selection and Output Field Mapping	22
Adding Lightning Components to Record Pages	23
RPA Bot Launcher Lightning Component	23
Configuration Info Lightning Component	25
Create a Process in Process Builder	28

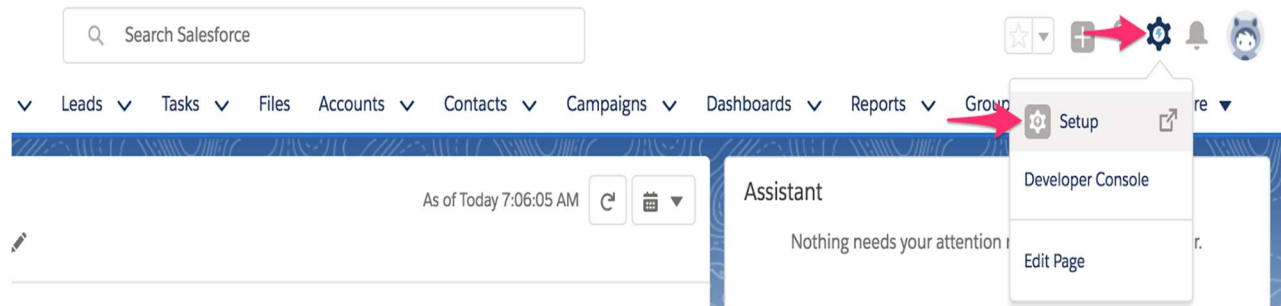
Introduction

This document serves as a configuration guide for the Automation Anywhere RPA Bots for Salesforce Application. RPA Bots for Salesforce is an intelligent automation solution offered on the Salesforce AppExchange marketplace enabling users to automate business tasks using bots from anywhere inside Salesforce. The RPA solution consists of the following components:

- **Automation Anywhere Lightning App for Salesforce**
The RPA Bots for Salesforce connector uses a combination of a Lightning App to deliver user friendly and intuitive bot configuration wizards along with APEX code and a collection of REST APIs to deliver a secure integration between the Salesforce platform and the Automation Anywhere Enterprise Control Room.
- **Automation Anywhere Lightning Web Component for Salesforce**
The Bot Launcher component was built using the Salesforce Lightning UI framework, providing users the ability to launch bots from anywhere inside a Salesforce record page. The entire application is also integrated with the Salesforce Process/Flow Builder allowing you to launch Bots automatically in response to an event such as a record update.

The first section covers the mandatory configuration steps in your Automation Anywhere A2019 Control Room instance prior to installing the package from the AppExchange Listing.

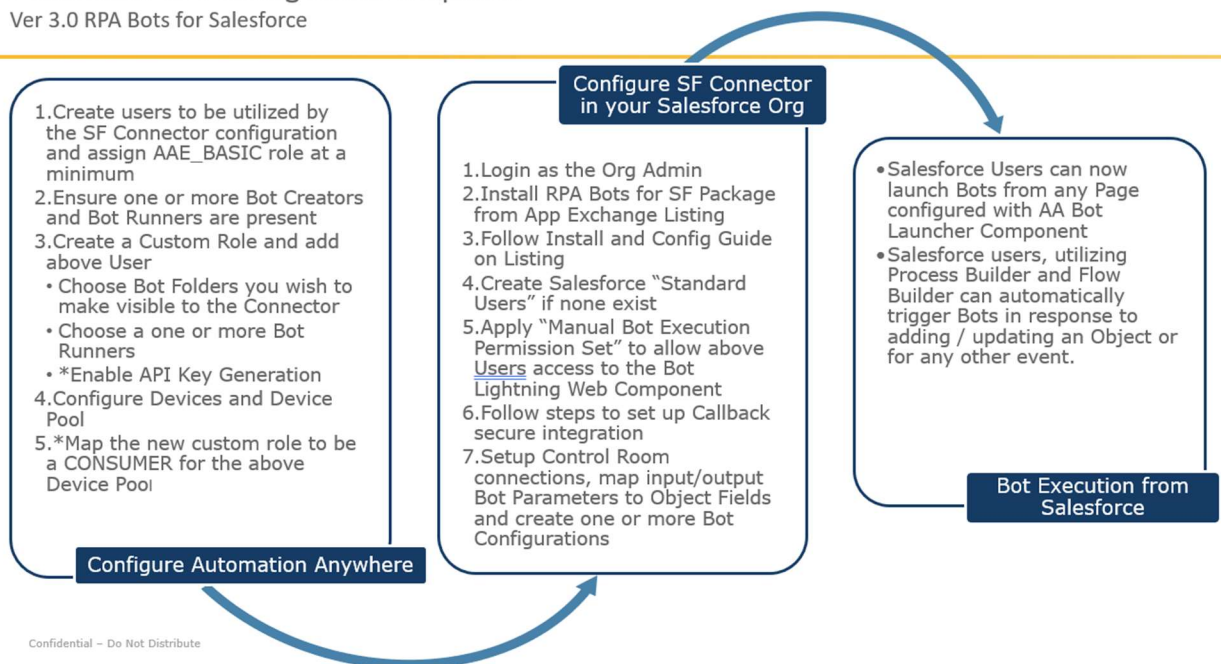
The next section covers the installation and configuration of the package in your Salesforce Organization. The following sections will walk you through applying permission sets and completing the Setup Assistant. This guide is meant to walk you through configuring your Org in a Lightning Experience environment. Throughout this guide, you will be instructed to navigate through the Salesforce Setup pages requiring System Administrator access. To do so, you will need to click on the gear to the upper right and select Setup. Once in Setup, you may use the Quick Find box to find and navigate to the appropriate section.



Installation and Configuration Sequence

Installation and Configuration Sequence

Ver 3.0 RPA Bots for Salesforce



Configure Automation Anywhere

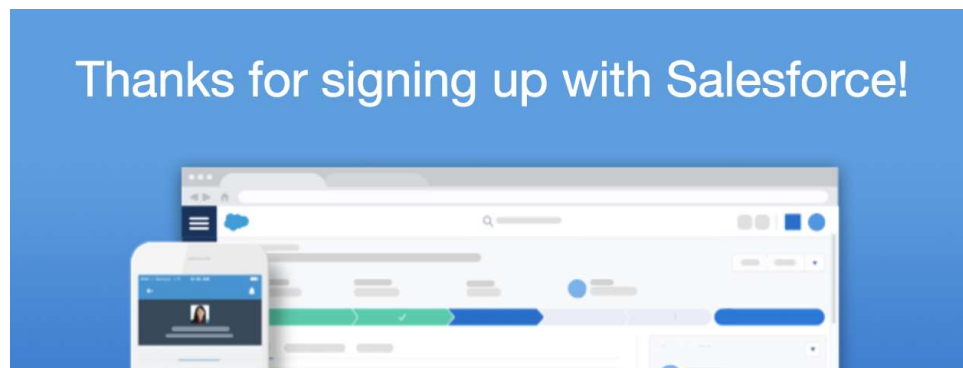
1. **Prerequisite:** Ensure your Automation Anywhere Control Room contains one or more Bot Runner and Bot Creator licenses and you have Admin Credentials to perform the following steps.
2. Create a User account for the Salesforce Connector. Ensure this User has a minimum "AAE_BASIC" Role
3. Create custom Role and perform the following steps
 - a. Features Tab: Ensure the following checkboxes are enabled:
 - i. Run my Bots
 - ii. View my Bots
 - iii. Optionally - Generate my API Key
 - b. Bots Tab: Select the one or more Bots Sub Folders you wish to give access to this Connector and ensure the Checkboxes for "Run & Execute" and "View Content" are checked for the selected sub folders.

- c. Run as Tab: Select one or more Bot Runners users from your collection and move them to the right. This will now be the Pool of Bot Runner licenses mapped to this Role
 - d. Users Tab: Select the new User created in the first step above, ensuring this custom Role has been assigned to the new User created earlier. If creating multiple users for Salesforce Connections, add those users to this role.
4. If choosing to use Device Pools to handle bot executions, configure one or more Devices and add them to a new Device Pool. Under the “Consumers” Tab, ensure you select the custom Role you created above.
5. If you choose to utilize an API Key, login as your new users and navigate to the User icon on the top right corner of your Control Room page - click “Generate API Key” to create an API Key for that user.
6. Save this Username and API Key credentials. You will use them in the Salesforce Connector configuration screen described in the following sections.

Preinstallation in Salesforce

Creating a test environment using a Developer Trial Instance

- Navigate to <https://developer.salesforce.com/signup> and sign up for a free trial instance. Once you've signed, an email will be sent to you with details on your trial account
- Once the verification email is received, click **Verify Account**



Click below to verify your account.



To easily log in later, save this URL:

<https://login.salesforce.com/>

Username:

adminuser+qatesting@appiphony.com

Again, welcome to Salesforce!

- Change your password:
 - Enter a New Password and confirm the New Password
 - Select a Security Question and enter an Answer
 - Click **Change Password**

Change Your Password

Enter a new password for
adminuser+qatesting@appiphony.com. Make sure to
include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

▼ In what city were you born?

* Answer

New York

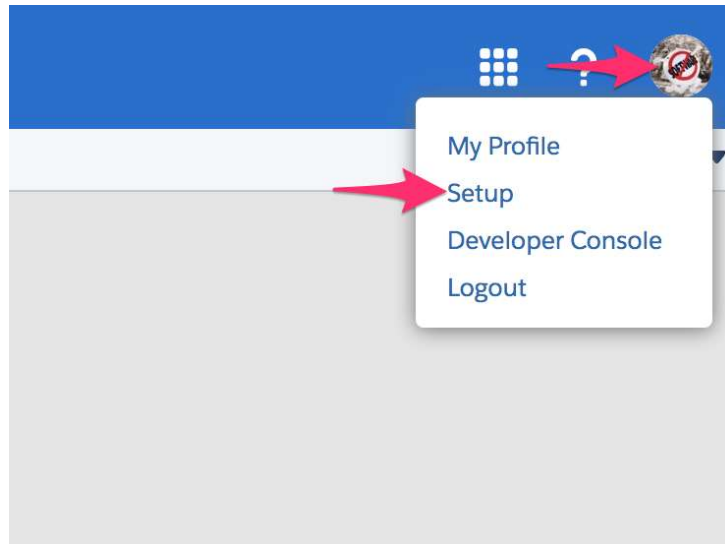
Change Password

Password was last changed on 7/19/2019 12:21 PM.

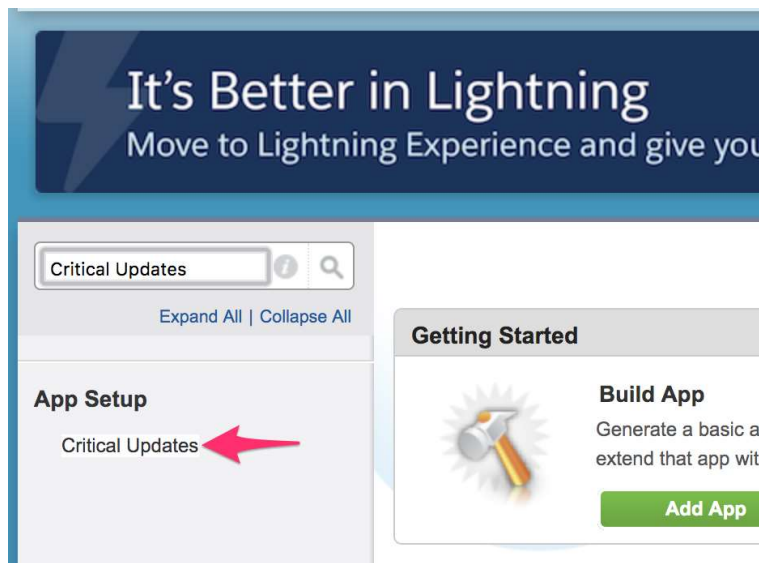
Enable Lightning Experience

If your org is not Lightning enabled, you can use the following steps to enable the Lightning Experience.

- Navigate to Classic Setup by selecting the avatar icon at the top right, and clicking **Setup**



- Using the Quick Find box, search for **App Setup > Critical Updates**



- Navigate to the update name "Turn on Lightning Experience", and click **Activate**

Critical Updates

Help for this Page ?

This page lists critical updates that are scheduled for activation in your organization.

- Click **Review** on an update to find out what's changing and how it affects your customizations.
- If the update has an **Activate** link, test the update by activating it in your Sandbox or production environment. We recommend testing activations during off-peak hours.

Note: Salesforce automatically activates critical updates on the date indicated.

Updates					
Action	Update Name	Update Summary	Auto-Activation Date	Status	
Review Activate	Turn on Lightning Experience	Salesforce will turn on Lightning Experience on a rolling basis for all orgs with editions that support Lightning Experience.	10/11/2019 74 days remaining	Not Activated	

- Click **Activate** again to enable Lightning

Activate Update

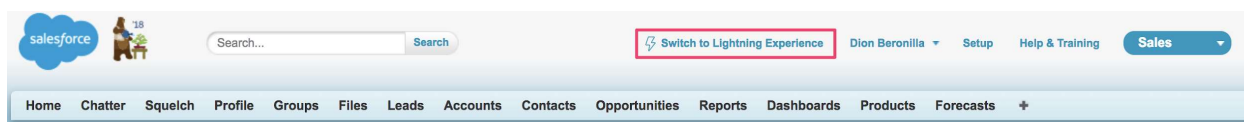
Before activating this update, please be sure you have reviewed the update and all affected customizations. [Review Update](#)

After analyzing the impact, you can activate this update. Enter a comment to help track the activation history of this update.

Comment

Activate

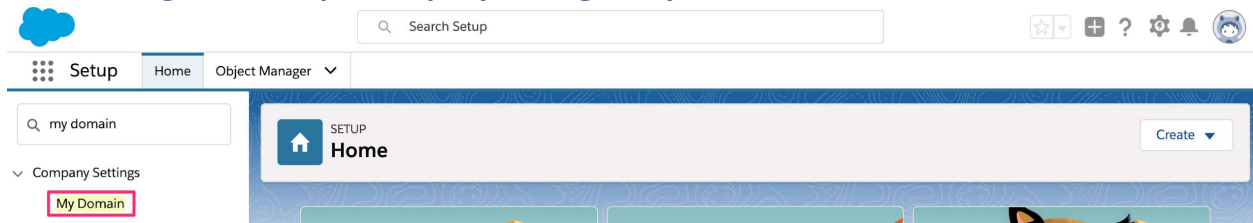
- Switch to Lightning by clicking **Switch to Lightning Experience** at the top of the page.



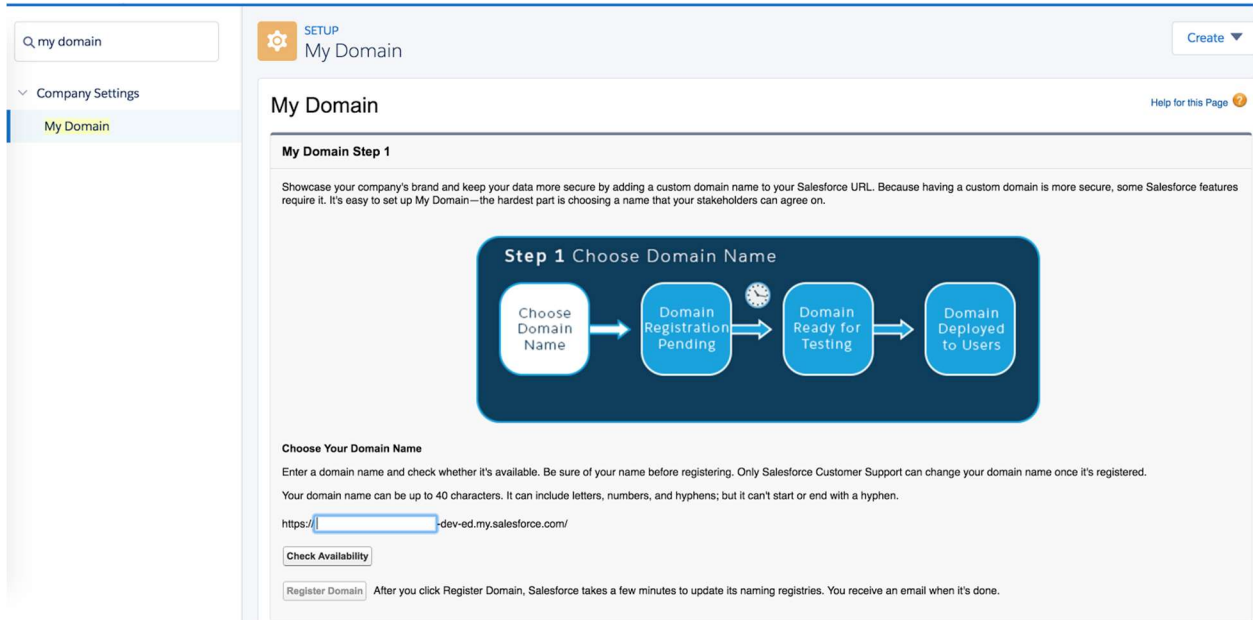
Set up a Custom Salesforce Domain

Before you install the packages to your org, be sure you have set a custom Salesforce domain for your organization. If you don't set the custom domain, you won't be able to see Lightning Components in the **Custom - Managed** section of the **Lightning App Builder** while setting up your Lightning pages.

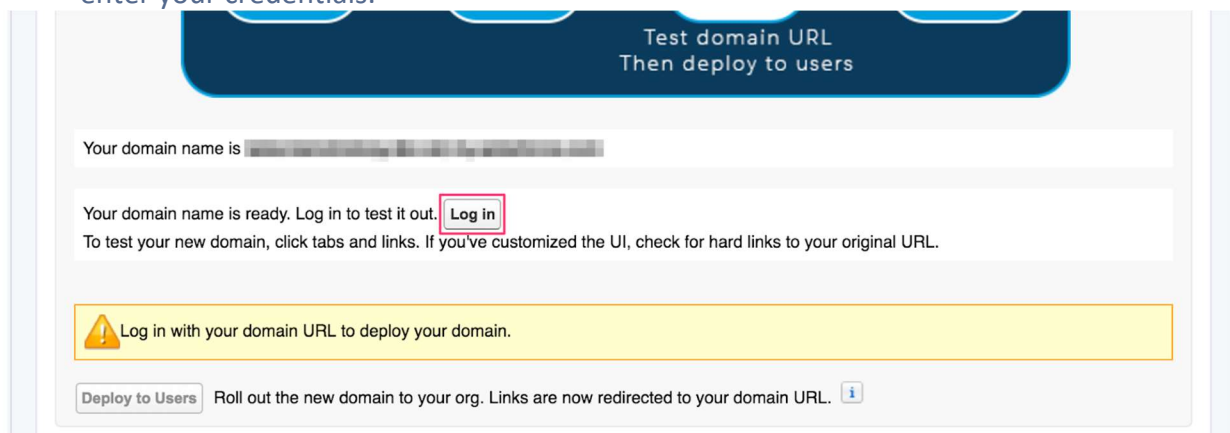
- Navigate to **Setup > Company Settings > My Domain**



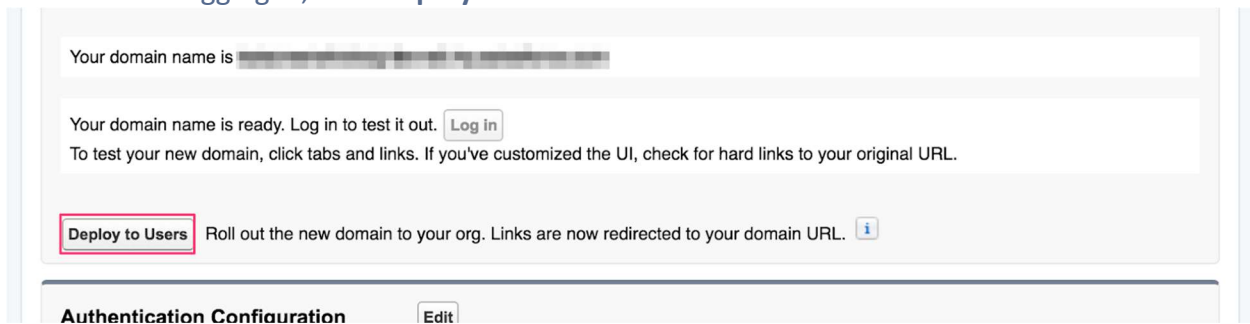
- Check for the availability of a domain and register it



- After the domain has been registered, refresh the page. You will need to log in to the new domain for the org in order to continue the process. Click on the **Log in** button and enter your credentials.



- After logging in, click **Deploy to Users**



The screenshot shows a Salesforce configuration page. At the top, it says "Your domain name is" followed by a masked domain. Below that, it says "Your domain name is ready. Log in to test it out." with a "Log in" button. Then, it says "To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL." At the bottom, there is a "Deploy to Users" button highlighted with a red box, and a text description: "Roll out the new domain to your org. Links are now redirected to your domain URL." with an information icon. Below this is a section titled "Authentication Configuration" with an "Edit" button.

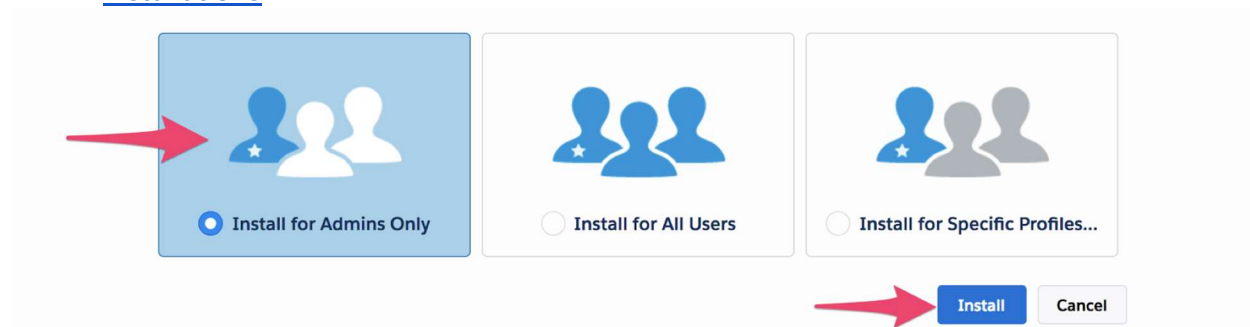
Installation in Salesforce

Installing the Automation Anywhere Package

Copy and paste the package install URL into your browser's address bar (please contact your administrator for the package link). If you are not already logged into the org you wish to install the package into, salesforce will prompt you to log in.

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed.

For further information, [please click here to refer salesforce documentation on Package Installations](#).



The screenshot shows the Salesforce package installation options screen. There are three radio button options: "Install for Admins Only" (selected), "Install for All Users", and "Install for Specific Profiles...". A red arrow points to the "Install for Admins Only" option. Below the options, there is an "Install" button and a "Cancel" button. A red arrow points to the "Install" button.

- **Approve Third-Party Access** - check off the box and click **Continue** to start the package installation when the modal appears. As it states, this is to allow data to be sent back and forth between your Salesforce org and Automation Anywhere.

×

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
whatfix.supremomono.com	☒

☒ Yes, grant access to these third-party web sites

Continue

Cancel

Configure Automation Anywhere Package

Connected App for Callback

Callback is a term which describes being able to retrieve outputs of your bot directly from your bot execution. In this case, the RPA Bots for Salesforce connector allows you to receive a bots output data in Salesforce and to map that data to the Salesforce object type of your choosing. The following steps will guide you through the process of setting up the security, authorizations and integration between Automation Anywhere and the Salesforce API's to allow for successful communication between the two platforms specifically as it relates to bot callback data.

1. In your Salesforce org, navigate to **Setup > Security > Certificate and Key Management** or type **"Certificate"** in the Quick Find box
2. On the Certificate and Key Management page, select whether you'd like to create a Self-Signed certificate or a CA-Signed certificate.
 - a. If creating a Self-Signed certificate, fill in the Label and Unique Name inputs with values of your choosing that will allow you to easily identify the certificates purpose if required at a later time. Also make note of the Unique Name which will be required in a subsequent step.
 - b. If creating a CA-Signed certificate, fill in all mandatory fields marked by the red indicator. Then follow the steps outlined on the Salesforce documentation to ensure the certificate is signed by a certificate authority and uploaded back into Salesforce before it can be used. Documentation here: https://help.salesforce.com/articleView?id=security_keys_uploading_signed_certificate.htm&type=5
3. Once either A or B have been completed in entirety, download the certificate locally as it will be required in a later step
4. Next, navigate to Setup > Apps > App Manager or type "App Manager" in the Quick Find box.
5. Click the New Connected App button
6. Fill in the following required values:
 - a. Connected App Name of your choosing
 - b. API Name is auto-generated but can be customized if needed
 - c. Contact Email – specify your email which may be used by Salesforce to contact you about your Connected App if there are any technical issues
 - d. Under the API (Enable OAuth Settings) section, check the box labeled Enable OAuth Settings
 - e. Check the next box that should have now appeared labeled Enable for Device Flow
 - f. Check the box labeled Use Digital Signatures

- g. Click the Choose File button and upload your certificate that you had downloaded earlier
 - h. Within the Available OAuth Scopes picklist, select the following two options and ensure they've been added to the Selected OAuth Scopes box:
 - i. Access and Manage Your Data (API)
 - ii. Perform Requests on Your Behalf at Any Time (refresh_token, offline_access)
- 7. Click Save
- 8. Next, navigate to Users > Permission Sets or from the Quick Find box, type "Permission Sets"
- 9. Click New and Provide a Label for your new Permission Set. Click Save. Note: this permission set will allow your Bot Launcher users to be able to run bots that have a callback operation. So remember to assign both this new Permission Set as well as the AAI RPA Bots Lightning Component User Permission Set to all Standard Users who will trigger bots from Salesforce
- 10. Click on Assigned Connected Apps
- 11. Click the Edit button and then select your newly created Connected App from the Installed Connected Apps box and ensure its added to the Enabled Connected Apps box. Click Save.
- 12. Next, navigate to Setup > Apps > App Manager or type "App Manager" in the Quick Find box.
- 13. Locate your newly created Connected App in the list, and using the arrow button on the far right, select Manage from the available options
- 14. Click the Edit Policies button
 - a. Under the OAuth Policies section, change the following values:
 - b. Permitted Users: Admin Approved Users are Pre-Authorized
 - c. IP Relaxation: Relax IP Restrictions
- 15. Click Save
- 16. Navigate back to the App Manager page by going to Setup > Apps > App Manager or type "App Manager" in the Quick Find box

17. Locate your newly created Connected App in the list, and using the arrow button on the far right, select View from the available options
18. Under the API (Enable OAuth Settings) section, locate the Consumer Key value. Copy and save that value to notepad or some other text editor
19. Click the App Launcher and locate the Automation Anywhere app
20. Once you have it open, locate the App Settings tab
21. Certificate API Name - Enter the Unique Name of the certificate you created earlier
22. Callback Connected Consumer Key – copy and paste the Consumer Key value that you had noted earlier in your text editor
23. Click Save
24. Next, navigate to Remote Site Settings by going to Setup > Security > Remote Site Settings or type “Remote Site” in the Quick Find box
25. Click New Remote Site
26. Provide the following values for your new Remote Site setting:
 - a. Remote Site Name – any name of your choosing. Eg. AATokenURL
 - b. Remote Site URL - <https://login.salesforce.com>
27. Click Save

Your Callback settings are now complete and ready to use with your bot configurations!

Permission Sets

The package includes the **AAI RPA Bots Lightning Component User** permission set that must be assigned to any Salesforce Standard user that will use the Automation Anywhere Bot Launcher Lightning Component. To assign the permission set to users, navigate to **Setup > User > Permission Sets**

- Select the **AAI RPA Bots Lightning Component User** permission set

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All ▾ [Edit](#) | [Delete](#) | [Create New View](#)

[New](#) 

☐	Action	Permission Set Label ↑	Description
☐	Del Clone	AAI RPA Bots Administrator	Enables a Salesforce user to run an Automation Anywhere bot from a Salesforce record page.
☐	Del Clone	AAI RPA Bots Lightning Component User	Enables a Salesforce user to run the Bot Launcher component.
☐	Clone	ActionPlans	
☐	Clone	Analytics View Only User	User permissions for View-only licensed apps.

- From the Permission Set Overview page, click **Manage Assignments**


SETUP
Permission Sets

Permission Set

AAI RPA Bots Lightning Component User

 [Clone](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	Enables a Salesforce user to run the Bot Launcher component.
License	
Session Activation Required	☐
Last Modified By	Oguzhan Cetinkaya , 2/3/2021, 11:31 AM

Apps

- Click **Add Assignments**


[Add Assignments](#) [Remove Assignments](#)

Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
No records to display.						

[Add Assignments](#) [Remove Assignments](#)

- Check the box next to the user(s) that you would like to assign the permission set to and click **Assign**

				Assign	Cancel
☐	Action	Full Name ↓	Alias	Username	
☒	Edit	User, Standard	suser	carlo+dharmastanduser@appiphony.com	
☐	Edit	User, Security	sec	insightssecurity@00d550000008nukeai.com	
☐	Edit	User, Integration	integ	integration@00d550000008nukeai.com	
☐	Edit	Chatter Expert	Chatter	chatty.00d550000008nukeai.9g02mujysqoj@chatter.salesforce.com	

***Repeat the steps above for the new Permission Set you created for your Connected App. This will ensure that users can run bots from the Bot Launcher as well as receive Callback data for record updates.

The package also includes the **AAI RPA Bots Administrator** permission set that can be applied to any Standard Salesforce user that should be able to access the RPA Bots for Salesforce Lightning Application in which to create and configure Connections and Bot Configurations. To assign the permission set to users, navigate to **Setup > User > Permission Sets**

- Select the **AAI RPA Bots Administrator** permission set and follow the same process as the previous steps outlined.

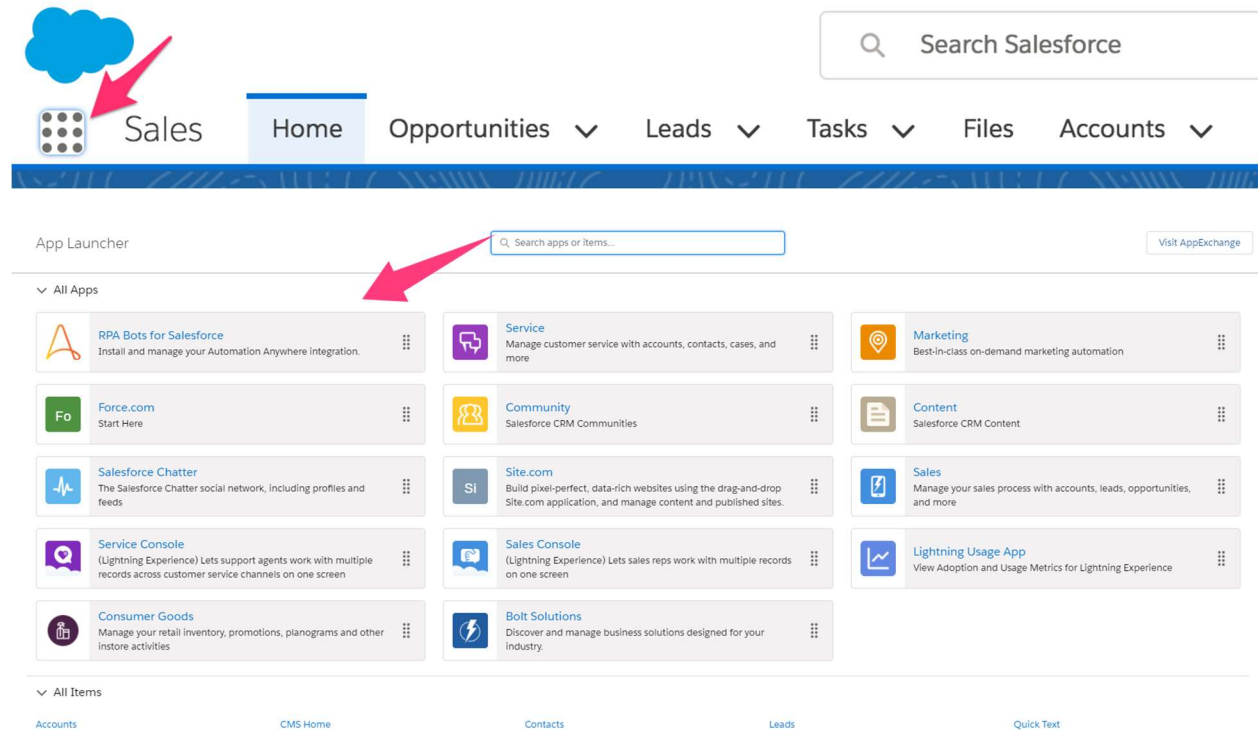
Remote Site Settings for different URI's

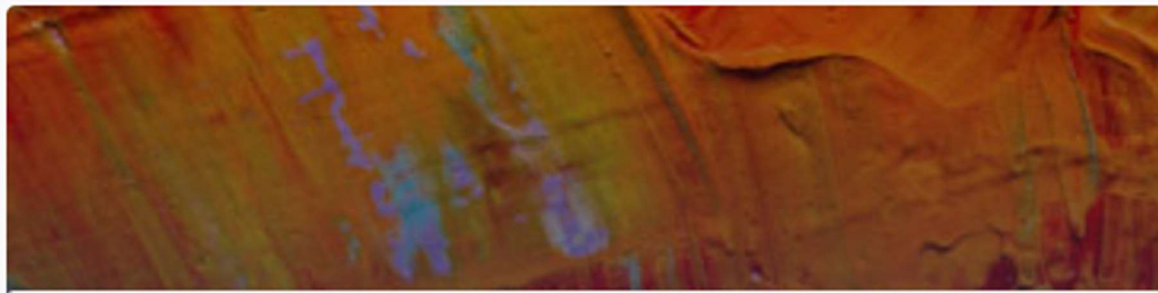
Any URI's that will be added during the RPA Bots for Salesforce New Connection Wizard also needs to be added as Remote Sites in Salesforce. After the remote site has been added, then you can go back to the Setup Wizard in order to complete Automation Anywhere Setup.

- Navigate to **Setup > Security > Remote Site Settings**
- Click **New Remote Site**

Automation Anywhere Setup

The Automation Anywhere RPA Bots for Salesforce application provides a wizard that will be used to guide you through the process of connecting your Salesforce org to your Automation Anywhere account in order to retrieve your list of bots and devices and to initiate your bots from Salesforce. After installation of the package, to begin configuration, navigate to **App Launcher > RPA Bots for Salesforce > Home** tab and click **Add Connection** or from the **Connections Tab > New**





Connect to your Control Rooms

Create a new connection to an Enterprise A2019 Control Room in the cloud or on-premise

[Add Connection](#)

- Enter a descriptive name into the Connection Name field to easily identify your connection in the Bot Configuration Wizard
- Enter in the **Automation Anywhere Control Room URL** to be used
- Enter your **Username** and **Password or API Key** into the required fields
- Click **Authorize**
- Once successfully authorized (grey status bar should turn green and indicate “Connected”), click **Finish**

Authentication

Username

.....

API Key

.....

Automation Anywhere Control Room URL

https://aa-dreamforce2019.my.automationanywhere.digital/

 Not Connected

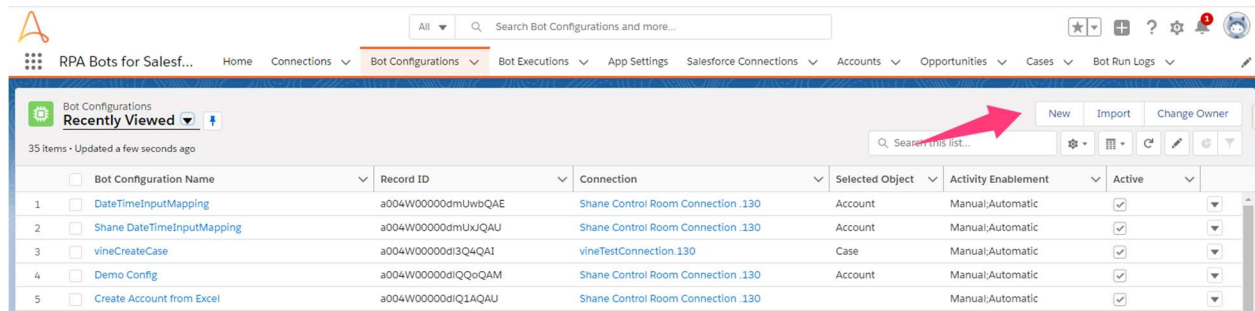
Authorize

Exit

Finish

Bot Configuration

To create new Bot configurations, select New in the top right corner –



In the Bot Configuration Tab, complete the parameters as follows:

- In the Bot Selection and Execution page, enter a description of the task you want to automate in the Bot Configuration Name field
- Select the TaskBot you created in the Enterprise Control Room from Bot selection drop down. Utilize the folder selection component to filter the bot list to the folder it is located in
- Select Manual or Automatic for the Execution Mode type. The Manual mode allows the Salesforce user to manually launch bots from their page. The Automatic mode is used to execute the bots automatically as a result of a condition inside Salesforce Process Builder.

Note: You can select both Manual and Automatic if you would like to enable executing the bot through the Bot Launcher and through Flows.

13. Click Next.

The screenshot shows the 'Bot Configuration Wizard' in the 'RPA Bots for Salesforce' application. The interface is divided into a main configuration area and a 'Guidance' sidebar on the right.

Step 1/3 - Bot Selection and Execution

☒ **Activate**
Make this bot configuration available to run from the Automation Anywhere Bot Launcher Lightning Component.

* Bot Configuration Name
Demo Config

* Connection
Shane Control Room Connection_130

Bot Directory
> Automation Anywhere

* Bot
Demo Automation

* Run as User
1 values are selected

Device Pool
0 values are selected

* Number of Run As Users to Use
0

* Execution Mode
☒ Manual
☒ Automatic

[Exit](#) [Next](#)

Guidance

Select a **Connection** and an item from your list of available bots, choose to configure it for manual execution, automatic execution, or both, and specify the device or device pool the bot should run on.

Manual Execution means the bot needs to be invoked explicitly on a Salesforce record using the **Automation Anywhere Bot Launcher**.

Automatic Execution means the bot is invoked automatically when trigger criteria is met through a **Flow**.

Run As User specifies the bot runner user(s) which will be used to run the bot on the bot runners default device. Multiple bot runner users can be selected which will allow the Control Room to determine the next available device to deploy to.

Device Pool allows for the selection of a defined Device Pool in Control Room to be used to deploy the bot. When you deploy a bot to a device pool, the bot is automatically sent to the first available device in that device pool.

Number of Users indicates how many run as users should be used from the list of Run As User provided. System will pick the specified number of run as users with the least number of tasks queued for the run user at

Object Selection and Input Field Mapping

Select a Salesforce Object you wish to associate the Bot with. The Bot Configuration will appear on this record page's Automation Anywhere Bot Launcher Lightning Web Component and will allow you to map Salesforce fields from this object into the Bot's input variables.

Proceed to map appropriate Salesforce Object Field to the Bot Parameters one by one. Click Add Mapping to map the Salesforce object fields to the Automation Anywhere bot input parameters that you configured for the TaskBot. The Mapping Type allows you to define whether the input will be from a Salesforce record field (SF Field) or as a static value (Input Field).

Click Save.

You have now successfully configured one or more Bots for the Users in your Salesforce Org!



All

Search Bot Configurations and more...

EPT: 3.51 s

1241.77 KB

★

RPA Bots for Salesf...
Home
Connections
Bot Configurations
Bot Executions
Bot Run Logs
Salesforce Connections
App Settings

BOT CONFIGURATIONS
Bot Configuration Wizard

Step 2/3 - Object Selection and Field Mapping

Selected Bot

Demo Automation

Object

Account

Field Mapping

☒ Allow users to edit field values

AUTOMATION ANYWHERE FIELD	MAPPING TYPE	SALESFORCE FIELD	REMOVE
inputDatetime	SF Field	Created Date	
inputBoolean	SF Field	Customer Portal Account	
inputNumber	SF Field	Employees	
inputString	SF Field	Account Name	
recordID	SF Field	Account ID	
inputDictionary	Input Field	testkey:testval,testkey2:testval2	
inputList	Input Field	listitem1:listitem2	

Guidance

First, choose an **Object** in this Salesforce org for this bot to run on.

Then, map the object's data fields to their corresponding fields on the bot. This will determine how information from Automation Anywhere is represented in Salesforce.

Object Selection and Output Field Mapping

This step of the Bot Configuration wizard is optional. It allows you to map a callback operation to the bot's output data. If you choose to proceed with this step, fill out the parameters as follows:

- On the Callback page, the TaskBot automatically appears in the Selected Bot field.
- The default value for the Operation dropdown is None which indicates that nothing will be done with the output variables from the bot. If an action should be taken, select either Create, Update, Upsert or Delete from the Operation dropdown.
- Select a Salesforce object from the Object field in which the Callback Operation will be applied to.
- Click Add Mapping to map the Salesforce object fields to the Automation Anywhere bot input parameters that you configured for the TaskBot.
- To remove a mapping field, click the icon in the Remove column.
- Click the drop-down list to select an Automation Anywhere bot input parameter field.
- Click the drop-down list to select a Salesforce object field.
- Click Save

Note: When performing Upsert, Update and Delete operations, you must map a Salesforce record ID value to the object's ID field so that a matching record can be located on which to perform the operation.

Step 3/3 - Callback

Selected Bot: Demo Automation

Operation: Update

Object: Account

AUTOMATION ANYWHERE FIELD	SALESFORCE FIELD	REMOVE
recordID	Account ID	
outputString	Account Name	
outputBoolean	Customer Portal Account	

Add Mapping

Back Exit Save

Guidance

First, choose a **Callback Operation** to be run once the bot has executed and returned its output variables to Salesforce:

- None** - No callback operation will be run
- Create** will create a new record of the specified type in the next drop down
- Update** will update the object specified using the mandatory mapped **Record ID** to identify the record
- Upsert** will update the object specified using a mapped **Record ID** to locate the record in the Salesforce organization. If no record is found, a new record of the specified object type will be created containing the mapped data
- Delete** will delete the record identified by the mandatory **Record ID** mapped field

Second, choose an **Object** in this Salesforce org which will be the target for the Callback operation.

Then, map the object's data fields to their corresponding output variables from the bot. This will determine how information from Automation Anywhere is returned and represented in the Salesforce record.

Adding Lightning Components to Record Pages

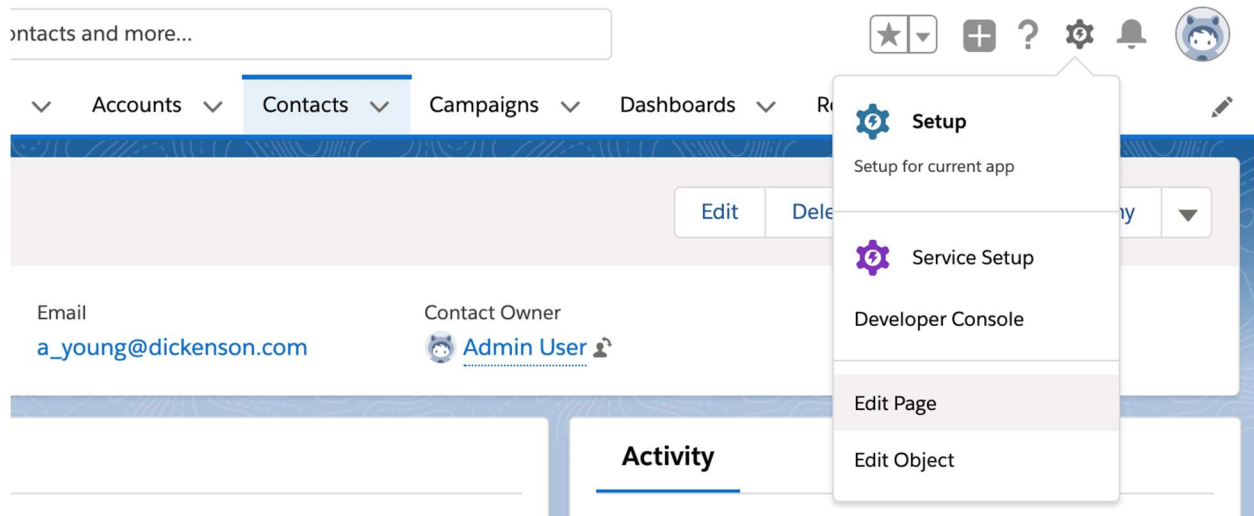
There are two Lightning Components which are a part of the Automation Anywhere Application – **AAI RPA Bot Launcher** and **AAIRPA Configuration Info**.

AAI RPA Bot Launcher is how users in your org will be able to launch and track Automation Anywhere TaskBots from any Salesforce record page while **AAIRPA Configuration Info** provides information to administrations setting up automated flows in Salesforce's **Flow/Process Builder**. **AAIRPA Bot Launcher** will need to be added to the lightning record pages of any objects from where users need to be able to manually execute bots.

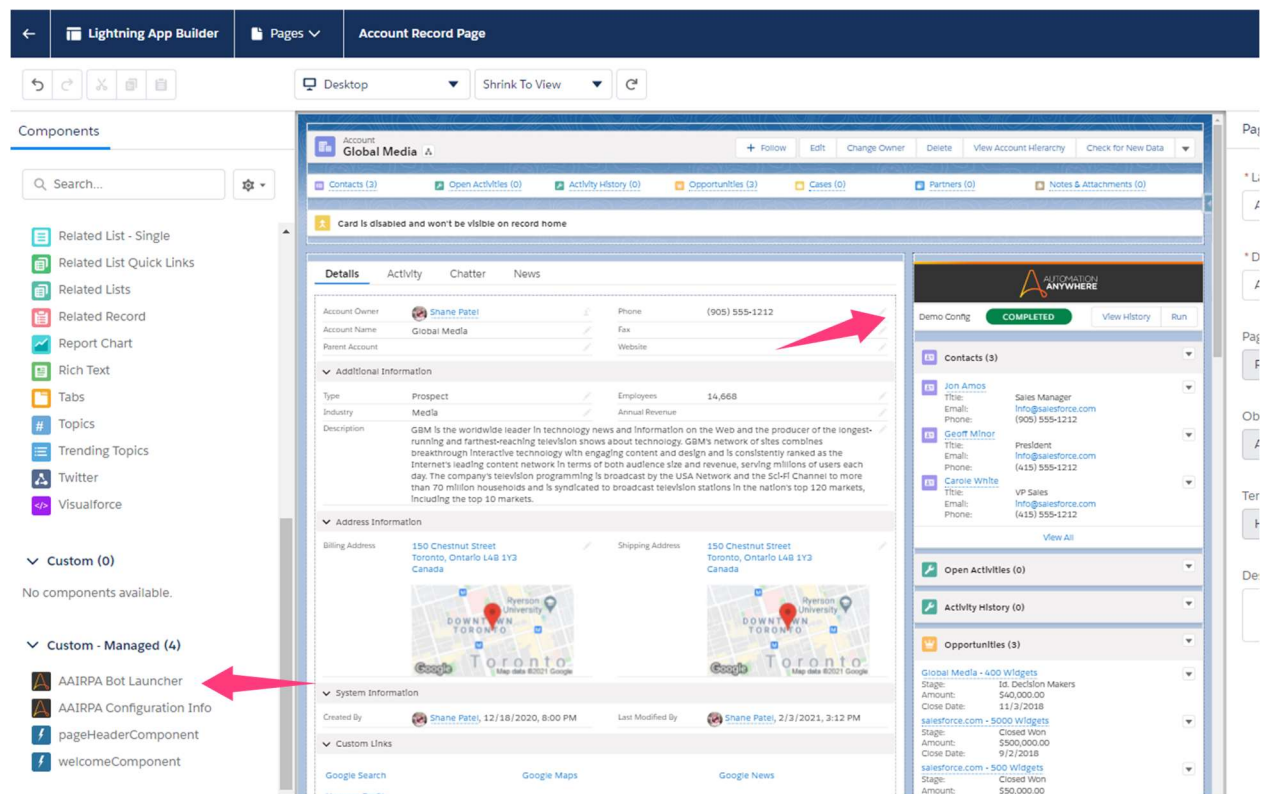
RPA Bot Launcher Lightning Component

The Bot Launcher component needs to be added to the record pages where you want it to be used.

- While on a Lightning record page, click on the setup gear and select **Edit Page**.



- Drag and drop **botLauncher** from the **Custom - Managed** section onto the main panel.



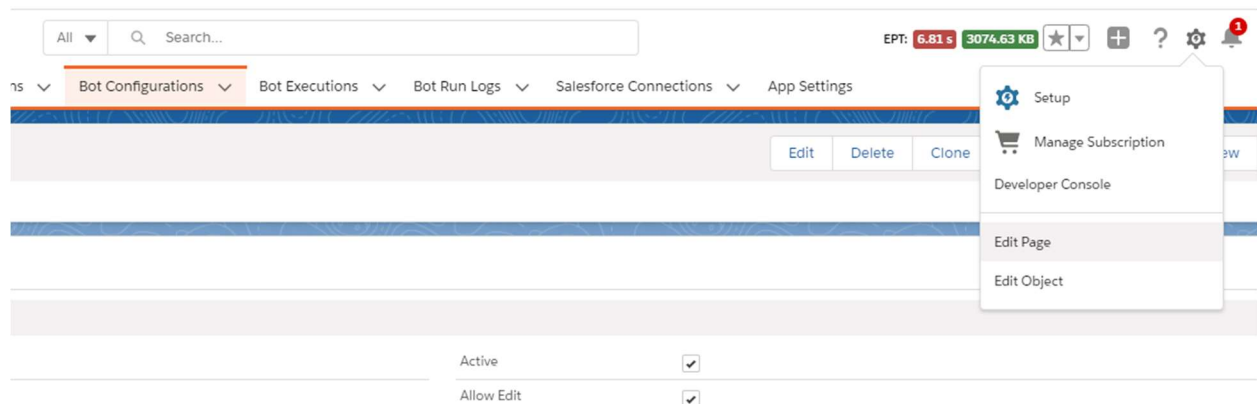
- Save the edited lightning page.
 - If this is the first time the lightning page for that object has been edited, the edited page may need to be activated.

- Activate the page as the default for the entire org, just a specific app, or according to profiles etc. as required for that specific record and based on your businesses requirements

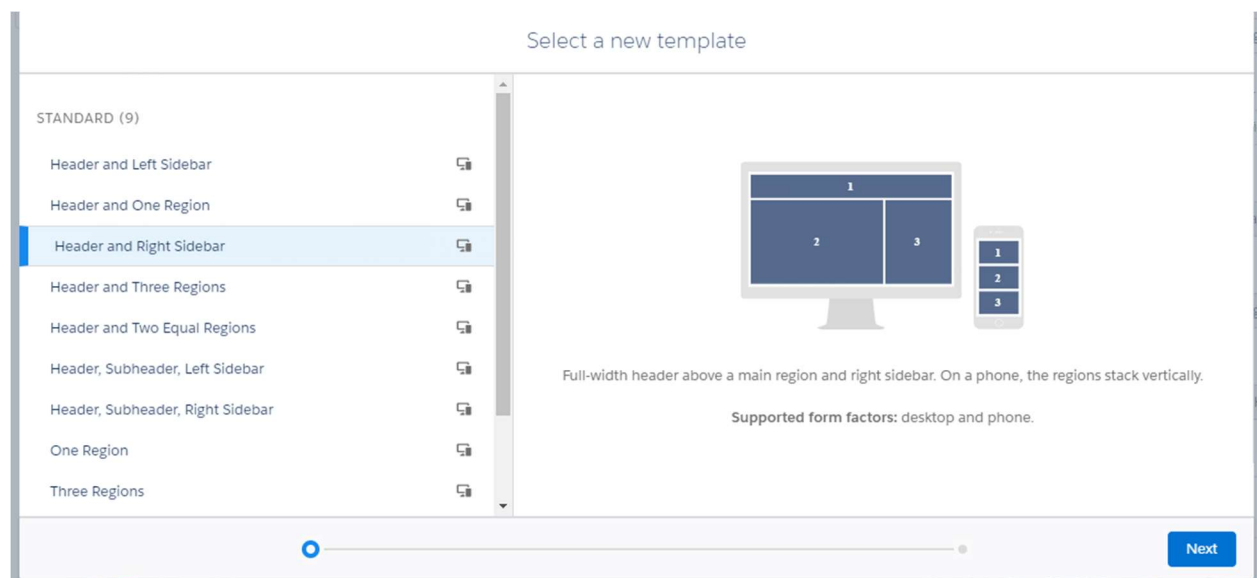
Configuration Info Lightning Component

The Configuration Info Lightning Component needs to be added to the Bot Configuration record pages where you want it to be used.

- While on the Bot Configuration Lightning record page, click on the setup gear and select **Edit Page**.



If the current layout template is assigned to Grouped Header and One Region, click the Change button and select another option that displays a sidebar or additional regions. In this example we'll use Header and Right Sidebar. Click Next.



You can leave the default mappings as is and click Done.

Select a new template

Map template regions

Map the regions of the old template to the regions of the new template. We'll take care of migrating your components. You'll have a chance to refine the layout and placement of your components after switching to the new template.

Current Regions (2)		New Regions (3)
Header	→	Header
Main Region	→	Main Region

[Back](#) [Done](#)

- Next, locate the AAIRPA Configuration Info component under Custom-Managed in the components list and drag and drop that onto the right sidebar
- Click Save

Lightning App Builder | Pages | Bot Configuration Record Page

Desktop | Shrink To View

Components | Fields

Search...

Record Detail - Mobile
Related List - Single
Related List Quick Links
Related Lists
Related Record
Report Chart
Rich Text
Tabs
Topics
Trending Topics
Visualforce

Custom (0)
No components available.

Custom - Managed (4)
AAIRPA Bot Launcher
AAIRPA Configuration Info
pageHeaderComponent
welcomeComponent

Get more on the AppExchange

Bot Configuration Demo Config

Bot Executions (2)

Details

Bot Configuration Name: Demo Config | Active: ☒ | Allow Edit: ☒ | Owner: Shane Patel

Selected Object: Account

Mappings

```
[{"aaField": "InputDatetime", "type": "DATETIME", "mappingType": "sfField", "sfField": "CreatedDate"}, {"aaField": "InputBoolean", "type": "BOOLEAN", "mappingType": "sfField", "sfField": "IsCustomerPortal"}, {"aaField": "InputNumber", "type": "NUMBER", "mappingType": "sfField", "sfField": "NumberOfEmployees"}, {"aaField": "InputString", "type": "STRING", "mappingType": "sfField", "sfField": "Name"}, {"aaField": "recordId", "type": "STRING", "mappingType": "sfField", "sfField": "Id"}, {"aaField": "InputDictionary", "type": "DICTIONARY", "mappingType": "InputField", "InputField": "testkeytestvaltestkey2testval2"}, {"aaField": "InputList", "type": "LIST", "mappingType": "InputField", "InputField": "listitem1listitem2"}]
```

Callback Object: Account
Callback Operation: Update
Callback Mapping

```
[{"aaField": "recordId", "type": "STRING", "sfField": "Id"}, {"aaField": "outputString", "type": "STRING", "sfField": "Name"}, {"aaField": "outputBoolean", "type": "BOOLEAN", "sfField": "IsCustomerPortal"}]
```

Bot Information

Bot Id: 4981 | Run As User: shane-runner
Bot Name: Demo Automation | Device Pool:
Connection: Shane Control Room Connection_130 | Device Id:
Run As User Id: 3

System Information

Created By: Shane Patel, 2/3/2021, 2:46 PM | Last Modified By: Shane Patel, 2/4/2021, 9:16 AM

Bot Executions (2)

Bot Execution Name	Status	Parent Id	Created Date
EXE-0002	COMPLETED	0014x000007PPIuAAM	2/3/2021, 3:02 PM
EXE-0005	COMPLETED	0014x000007PPIuAAM	2/3/2021, 3:12 PM

View All

Using This Configuration

To run this configuration, you'll need to set up an automation in Process Builder.

Make sure that it calls the Apex class `Run Bot` with the following variables:

- 1) `configurationId` is a string with the value `a014x000000xEqPAAV`. Copy this value for use in Process Builder.
- 2) `recordId` is a Field Reference with the value `object.Id`. You'll retrieve this value in Process Builder as it is relative to the record invoking the process.

- On the next few screens, assign this Lightning Record Page as the App Default for the **RPA Bots for Salesforce App**

Activation: Bot Configuration Record Page

Custom record pages can be assigned at different levels:

-  **The org default** record page displays for an object unless more specific assignments are made.
- ↳  **App default** page assignment, if specified, overrides the org default.
- ↳  **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT
APP DEFAULT
APP, RECORD TYPE, AND PROFILE

Set this page as the default for Bot Configuration records for specific Lightning apps. An app default page displays for all the object's records in an app unless specific app, record type, and profile assignments are made.

Assign as App Default

- Click on **Assign as App Default** after clicking on the **App Default** tab
- Select the **RPA Bots for Salesforce App**, click Next until **Save** is available - click **Save**

Select Apps

Select the Lightning apps to display "Bot Configuration Record Page" as the app default page.

Lightning Apps (5)	
App Name	Description
☐ LightningBolt	Discover and manage business solutions designed for your industry.
☐ LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☒ RPA Bots for Salesforce	Install and manage your Automation Anywhere integration.
☐ Sales	Manage your sales process with accounts, leads, opportunities, and ...
☐ Salesforce CMS	Manage content and media for all of your sites.

Cancel

Back

Next

Create a Process in Process Builder

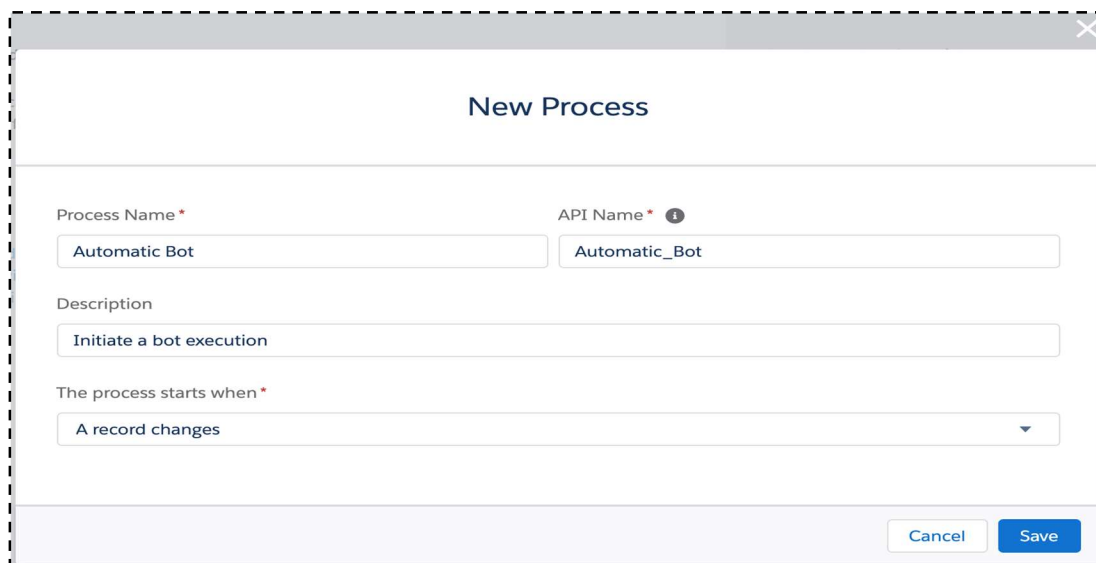
Both Lightning Flows and Process Builder Flows are supported. The following example will guide you through setting up a Process Builder automation that triggers a pre-configured bot. The same concepts can be applied to Lightning Flows.

The creation of a sample process is detailed below; note that the field values and criteria are for demonstration purposes and can be changed to whatever values are required for your specific process. I.E. the example has the process starts when a record changes, but any of the other values would work.

NOTE: Remember to copy and save the ID of the previously created Bot Configuration in the Bot Configuration setup screen. You will need it when configuring the Process Builder.

Navigate to **Setup > Process Automation > Process Builder**

- Create a new Process
- Fill in the required Process Name and API Name values
- Select when the automation should trigger using the The Process Starts When dropdown
- Click Save

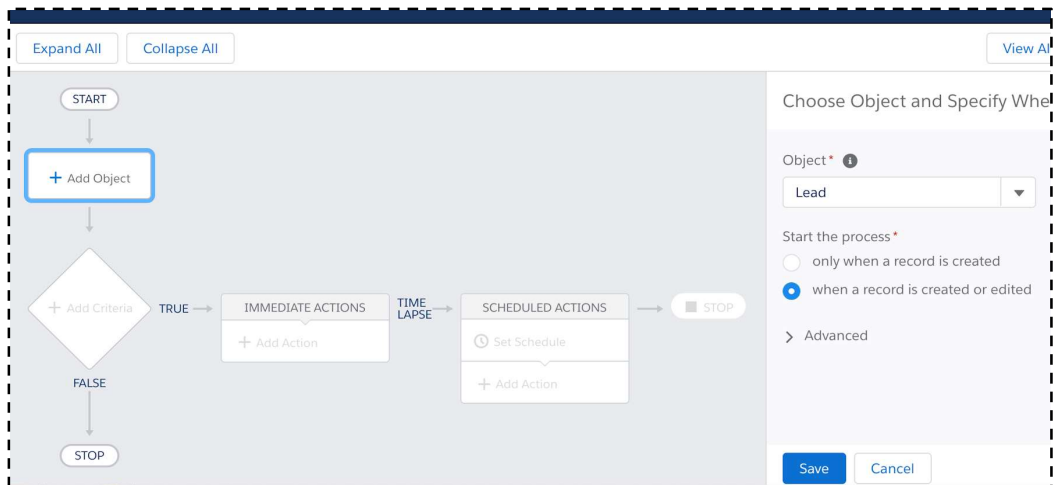


The screenshot shows a 'New Process' dialog box with the following fields and options:

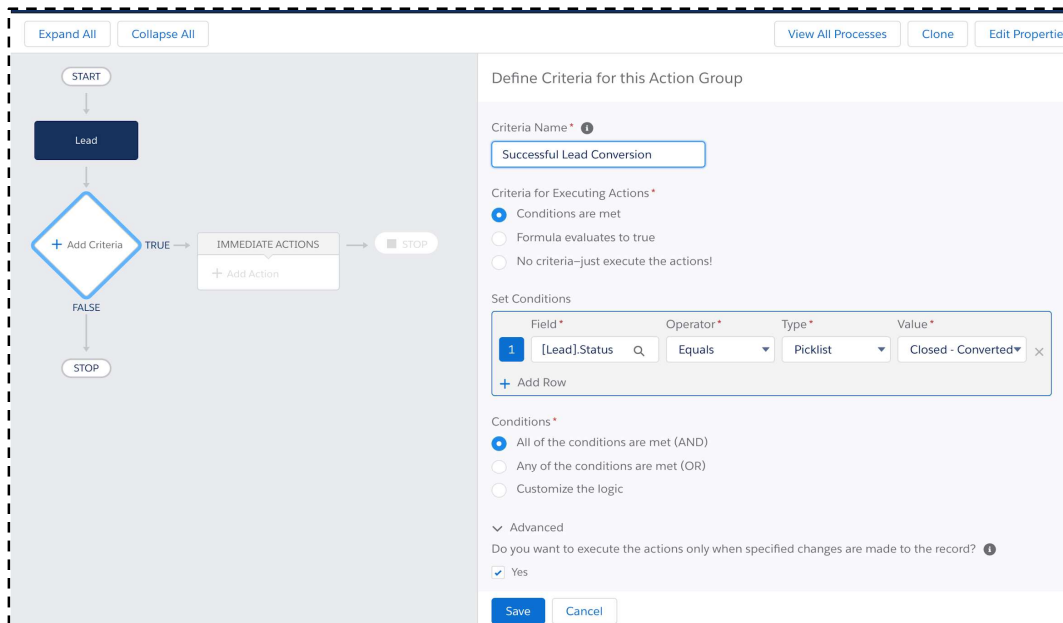
- Process Name ***: Text input field containing 'Automatic Bot'.
- API Name ***: Text input field containing 'Automatic_Bot'.
- Description**: Text input field containing 'Initiate a bot execution'.
- The process starts when ***: Dropdown menu with 'A record changes' selected.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

- Select an object and define when the process will be triggered
 - Eg. Select the Lead object
 - Start the Process when a Lead record is Created or Edited

- Click Save



- Set your Criteria
- I.E. Execute when a Lead's Status becomes Closed - Converted

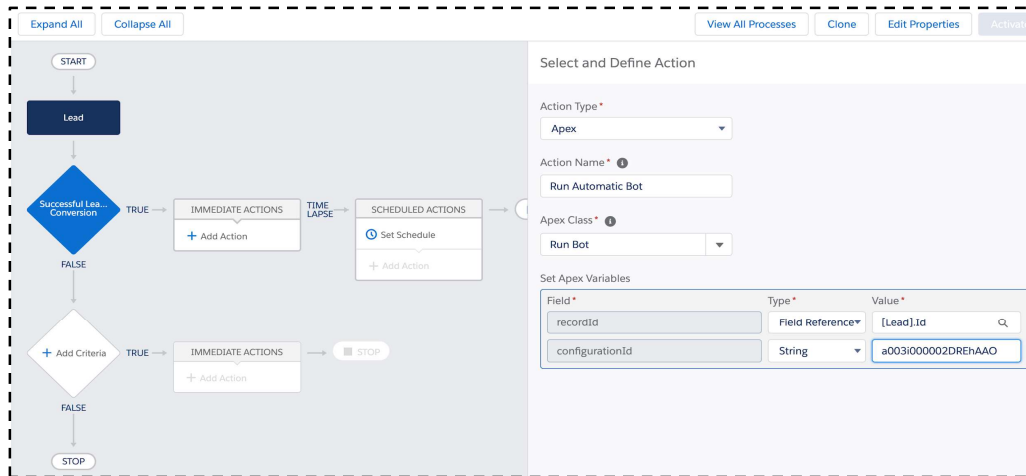


- Add an Action
- Search for and select the **Run Bot By Configuration** Apex Class
 - Reference the Object's Id for the **Record Id** variable which will allow passing that specific record's values to the TaskBot's input variables
 - Paste the Salesforce Record ID for the Automatic-enabled Bot Configuration as a string for the **Bot Configuration Id** variable. (See NOTE in the beginning of this section)
- Click Save

The screenshot shows a configuration form for an Apex action. It includes three fields: 'Action Type' with a dropdown set to 'Apex', 'Action Name' with a text input containing 'Run Bot', and 'Apex Class' with a dropdown menu open. The 'Apex Class' dropdown shows four options: 'Run Bot By Bot Configuration' (highlighted), 'Run Bot with API Key', 'Run Bot with Connection', and 'Run Bot With Password'. Each field has an information icon (i) next to its label.

For this example, we'll only use the Run Bot By Bot Configuration APEX class. However there are three other options available for you to utilize based on your needs and they are described as follows:

- Run Bot with Password – This option allows you to enter all of the connection details directly into the Action including Control Room URL, Username, **Password**, Run as User ID, Device Pool, etc.. It doesn't rely on any of the saved information in the Bot Configuration wizard.
- Run Bot with API Key - This option allows you to enter all of the connection details directly into the Action including Control Room URL, Username, **API-Key**, Run as User ID, Device Pool, etc.. It doesn't rely on any of the saved information in the Bot Configuration wizard.
- Run Bot with Connection – This option allows you to provide the Record ID of a saved Connection from the RPA Bots for Salesforce app. This ensures that the credentials are saved safely and securely in the application and therefore the developer only needs to provide details such as Run As User ID, Device Pool, and Variable details



- Save and activate the process
- The process will now automatically run according to the conditions you have set