

AppPerfect

MailChimp Bot - AppPerfect Corporation-ReadMe

Version 1.0

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Table of Contents

| | |
|--|-----------|
| 1. Introduction | 3 |
| Overview..... | 3 |
| Common Use cases | 5 |
| 2. Requirements & Prerequisites | 6 |
| System Requirements | 6 |
| Prerequisites..... | 6 |
| Security Measures..... | 6 |
| 3. Getting Started | 7 |
| Skill Matrix | 7 |
| Installation Hierarchy | 7 |
| Quick Start..... | 9 |
| 3.1.1 Setup | 9 |
| 3.1.2 Inputting your Access Code..... | 10 |
| 3.1.3 Configuration | 10 |
| 4. Logs | 14 |
| 5. Troubleshooting & Support | 15 |
| Support..... | 15 |
| FAQs | 15 |
| Appendix A: Record of Changes | 16 |
| Appendix B: Acronyms | 17 |
| Appendix C: References | 18 |

1. Introduction

This document contains all essential information for the user to make full use of the Bot or Digital worker. This manual includes a description of the functions, capabilities and step-by-step procedures for setup & configuration of the Bot.

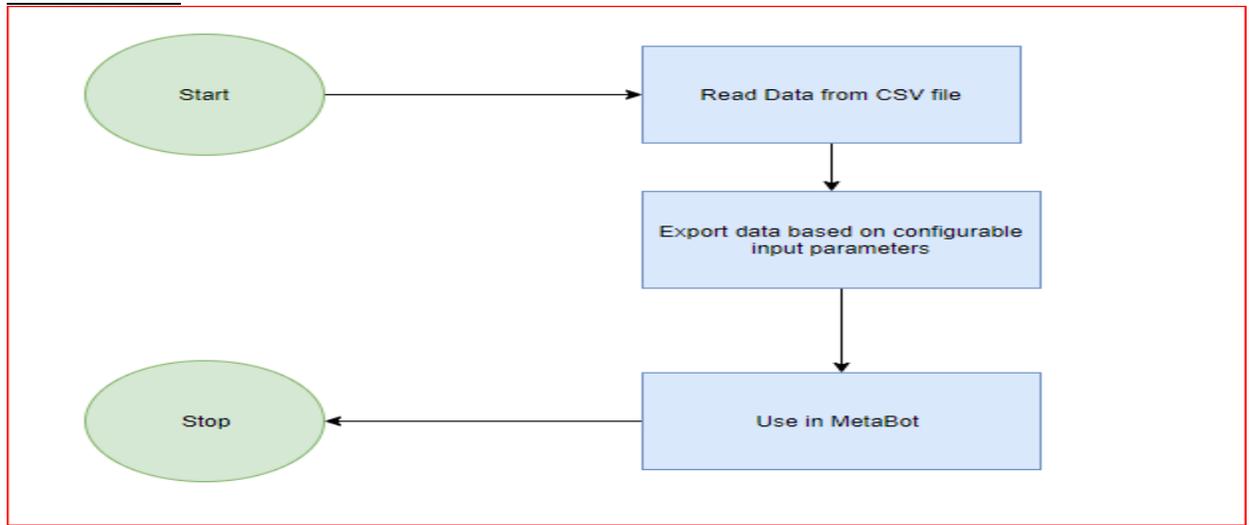
Overview

This Bot reads Member email id and List name Information from a [CSV](#) Template based on Filter Conditions & other configurable parameters (as explained below) and add and remove a member from the MailChimp list.

Detailed steps are as follows:

- 1) Read data from a [CSV](#) Template, e.g. AddMember.csv and RemoveMember.csv (Template may contain any data).
- 2) Export data from the [CSV](#) Template based on Filter conditions set by a user.
Filter conditions are as below (Click individual to read details)
 - [Filter based on Column Value](#)
- 3) Send the Exported data to a MetaBot that you designate

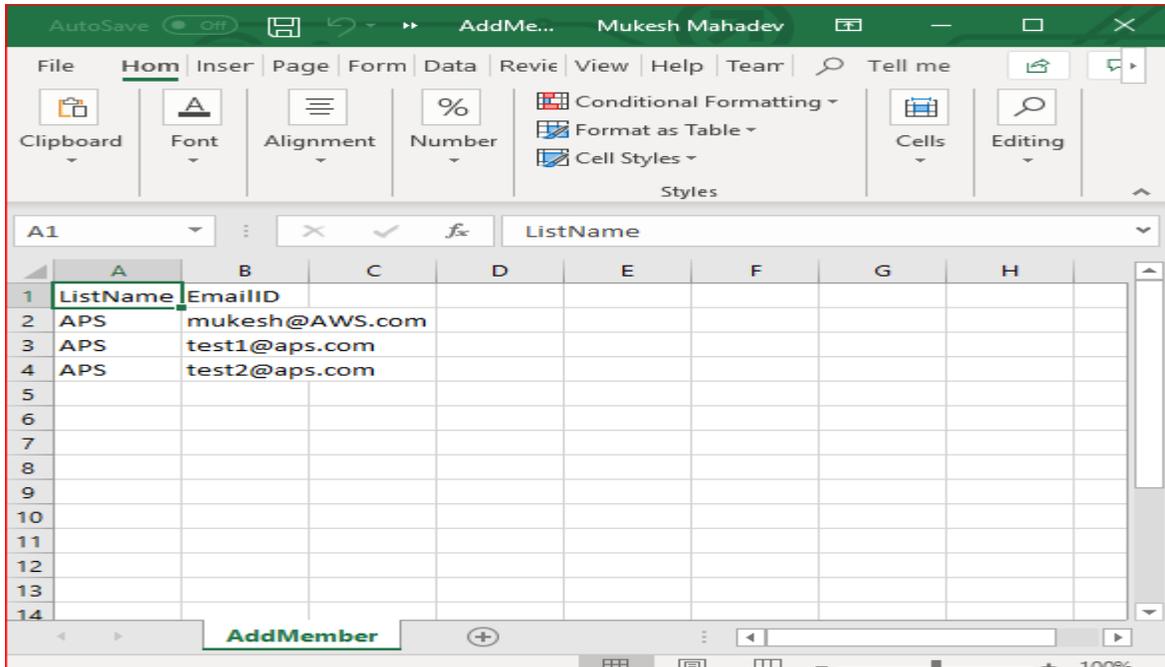
• Visual Flow –



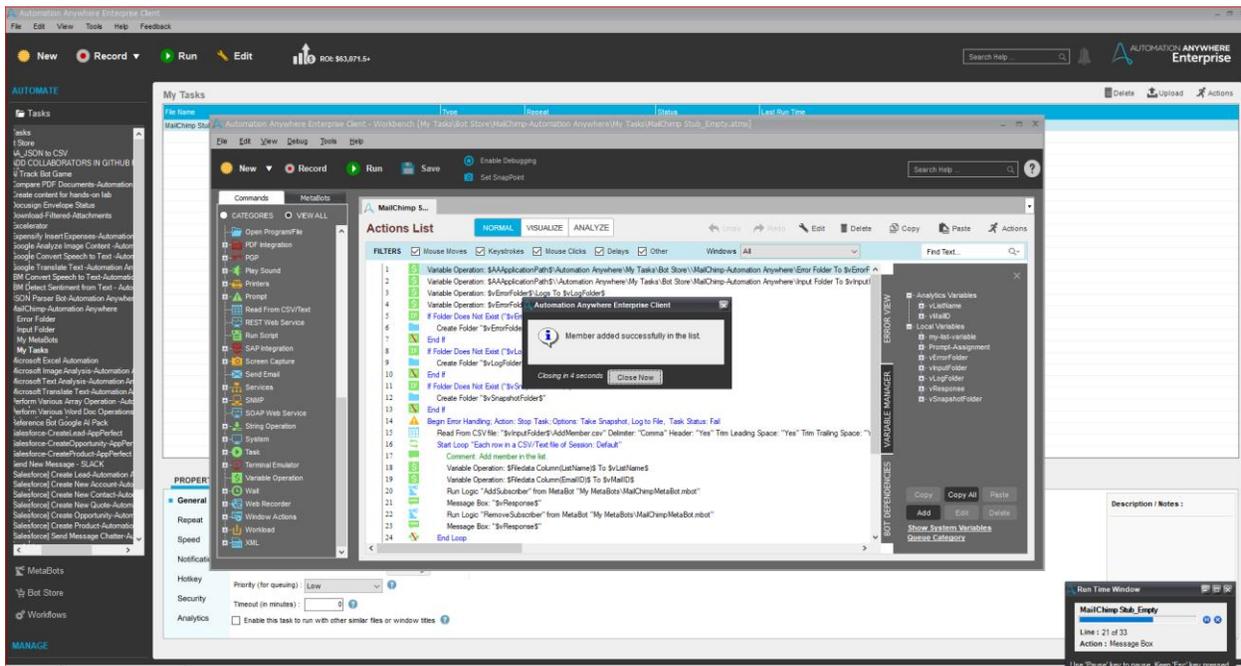
• Input and Output Example –

Input from CSV file as mention below

- **Input: Add member CSV File:**



- **Output: Message box:**



Common Use cases



A common use case, as shown above, is to add or remove a user from the list of MailChimp.

The fields in the [CSV](#) template can be changed to any data value that needs to be added to the list via MetaBot. Examples of other use cases include:

- Add the user to the MailChimp list.
- Remove the user from the list in MailChimp.

2. Requirements & Prerequisites

System Requirements



For the [PC](#) or server where the bot needs to run:

- ✓ [RAM](#): 8GB or higher
- ✓ PROCESSOR: Intel Core i5 or higher and equivalent for any other [OS](#)
- ✓ Hard Disk: Up to 2GB of overall free space in the [AA](#) Client installation drive.

Reference below for [Enterprise Client & Control Room system requirements](#).

Prerequisites



- ✓ **Software's needed -**
- ✓ [AA](#) Enterprise Client 11.3.3
- ✓ [AA](#) Enterprise Control Room 11.3.3
- **Accounts/License needed –**
- ✓ MailChimp Account. MailChimp account can be opened at [here](#)
- ✓ [AA](#) Enterprise License

Security Measures

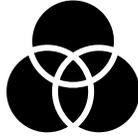


There are some security best practice recommendations that you may follow with your bot.

- It is not recommended to provide admin access to the Windows User Account executing the Bots, to avoid unintended data changes with the [CSV](#) Template.
- It is recommended to update the MailChimp [API](#) Token twice or more in a quarter to ensure data safety. Click [here](#) to revoke and regenerate your API key.

3. Getting Started

Skill Matrix



The functionality of the Bot has been divided into a set of skills.

Below is an overview of how the task bots and meta bots map to these skills:

| Skill | Task Files | MetaBot Files |
|----------------------------------|---------------------------|-----------------------|
| Add or Remove user from the list | MailChimp Stub_Empty.atmx | MailChimpMetaBot.mbot |

Installation Hierarchy



Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

Folder Structure on your Machine

| Folder Structure | Description |
|--|--|
| <p><AA Application Path></p> <p>1. My Tasks</p> | <p><AA Application Path> is the location where AA files are stored on your machine</p> <p>1. My Tasks</p> |

| | |
|---|---|
| <p>1.1. Bot Store</p> <p>1.1.1. MailChimpBot-AppPerfectCorporation</p> <ul style="list-style-type: none"> ➤ Error Folder <ul style="list-style-type: none"> • Logs <ul style="list-style-type: none"> ○ Error logs Month-Day-Year Hour Min Sec.txt • Snapshots <ul style="list-style-type: none"> ○ Error Snap Month-Day-Year.png ➤ Input Folder <ul style="list-style-type: none"> • AddMember.csv • RemoveMember.csv ➤ My Tasks <ul style="list-style-type: none"> • MailChimp Stub_Empty.atmx <p>2. My MetaBots</p> <ul style="list-style-type: none"> ➤ MailChimpMetaBot.mbot | <p>My Task Folder is the default directory where Bot Files are saved.</p> <p>1.1 Bot Store</p> <p>Bot Store Folder contains the Bot Name Folder that the installer creates while installation of the Bot.</p> <p>1.1.1 MailChimpBot-AppPerfectCorporation</p> <p>This folder is created by the installer and contains files and folders that are needed for the bot execution.</p> <ul style="list-style-type: none"> ➤ Error folder is where logs and snapshots of screens will be placed if something goes wrong with the bot during execution. ➤ Input Folder is where the input files that the bot needs for the execution of the use case are saved. <ul style="list-style-type: none"> • AddMember.csv provides list name and user email id as an input to the bot for adding members in the list. • RemoveMember.csv provides list name and user email id as an input to the bot for removing a user from the list. ➤ My Tasks folder contains all the developed Platform Source Code <p>2. My MetaBots folder contains the developed Metabots needed for the bot execution.</p> |
|---|---|

Quick Start

3.1.1 Setup



STEP 1 (Setting up a MailChimp Account):

Click [here](#)

The below page will appear once the above link is clicked -

Log in'. There are three input fields: 'Email', 'Username', and 'Password'. The 'Password' field has a 'Show' button with an eye icon. Below the input fields are four bullet points: 'One lowercase character', 'One uppercase character', 'One number', 'One special character', and '8 characters minimum'. At the bottom left is a 'Get Started!' button. At the bottom right is a disclaimer: 'By clicking the \"Get Started!\" button, you are creating a Mailchimp account, and you agree to Mailchimp's [Terms of Use](#) and [Privacy Policy](#).'" data-bbox="107 278 871 648"/>

- If you already have an account, click on '**Log in**'.
- For new users, enter require details and click on "**Get Started**".

Step 2 (Generating URL & Keys):

Find or Generate Your API Key

- Click [here](#) to navigate to the API doc section. Now click on "Your API Keys" to navigate to API section of your MailChimp account: Your API Keys
- Copy an existing API key or click the Create A Key button.

Register Your Application and get ClientID and Client Secret

- Log in to MailChimp account, navigate to the **Account** page.

- In the drop-down menu, select **Extras**, and then **API Keys**.
- Under the **Developing an App?** heading, click **Register and Manage Your Apps**.
- Click **Register an App**.
- In the appropriate fields, enter your application information.
- Click **Create**.
- After the registration is successful, an **Application created** message will display along with some more information at the end of your form, which includes the Client_ID and Client Secret. Do not share the Client_ID and Client Secret.

3.1.2 Inputting your Access Code

Step by Step Guide for Customers: Inputting Your Access Code [click here](#)

3.1.3 Configuration



STEP 1 (Configuring Credential in Control Room’s Credential Vault)

ApiKey and other sensitive information such as user credentials, Client ID, and Client Secret included in automation tasks, should be stored as credentials centrally in the Credential Vault.

These sensitive data items (stored in CR) can’t be accessed locally and can be used by the bots in the execution of task bot.

Below are the step-by-step instructions for what needs to be done to set up the URL and Token for MailChimp in the Credential Vault.

- ‘Locker Consumer Role’ needs to be assigned to the [AA](#) user (bot runner) which ensures the user has full access to the locker.
- Locker needs to be created with name as “MailChimp”
- Credential needs to be created with name as “MailChimp_Credential”, where the URL and Token are saved.

| Locker Name | Credentials Name | Attribute Name | Value |
|-------------|----------------------|----------------|--|
| MailChimp | MailChimp_Credential | ApiKey | Add APIKey value which is generated using the above links |
| MailChimp | MailChimp_Credential | AuthUrl | Ex: https://usX.api.mailchimp.com/3.0/ Here usX : replace with datacentre which you will get in the API key. APIKey ex: asfsdf_us3 so here is us3 is your data center. More info: click here |

| | | | |
|-----------|----------------------|--------------|--|
| | | | |
| MailChimp | MailChimp_Credential | ClientID | Add Client ID value which is generated using the above links |
| MailChimp | MailChimp_Credential | ClientSecret | Add Client Secret value which is generated using the above links |

For more information on how to set up credentials in the Control Room, please visit this [link](#) on the Automation Anywhere Product Documentation portal.

STEP 2 (Configuring Parameters with an External File)

The external file can be configured at -

AA Application Path > My Tasks > Bot Store > MailChimpBot-AppPerfectCorporation> Input Folder > AddMember.csv

AA Application Path > My Tasks > Bot Store > MailChimpBot-AppPerfectCorporation> Input Folder > RemoveMember.csv

This is where the input values for variables are stored which is needed by the bot at the time of execution. (Sensitive variables – like user name, password, and URLs will be an input in the Credential)

Below is a table that summaries what the variable name is, what it does, and an example of the input:

AddMember

INPUT VARIABLES: NEEDS TO BE CONFIGURED BY THE USERS FOR INPUT PARAMETER

| Variable Name | Type | Mandatory (Yes/No) | Purpose | Example Input |
|----------------|------|--------------------|---|----------------|
| vInputFileName | Text | Yes | File Name for the template from which Bot reads the value from. | AddMember.csv |
| vListName | Text | Yes | List name where we want to add a user. | APS |
| vMailID | Text | Yes | User Email id which we want to add in the list. | Mukesh@aps.com |

OUTPUT VARIABLES: DISPLAYS OUTPUT RESPONSE

| Variable Name | Type | Mandatory (Yes/No) | Purpose | Example Output |
|---------------|------|--------------------|---------|----------------|
|---------------|------|--------------------|---------|----------------|

| | | | | |
|----------|------|-----|--|--|
| Response | Text | Yes | Displays whether the member has been added successfully in the list. | Member added successfully in the list. |
|----------|------|-----|--|--|

RemoveMember

INPUT VARIABLES: NEEDS TO BE CONFIGURED BY THE USERS FOR INPUT PARAMETER

| Variable Name | Type | Mandatory (Yes/No) | Purpose | Example Input |
|----------------|------|--------------------|---|------------------|
| vInputFileName | Text | Yes | File Name for the template from which Bot reads the value from. | RemoveMember.csv |
| vListName | Text | Yes | List name from where we want to remove the user. | APS |
| vMailID | Text | Yes | User Email id which we want to remove from the list. | Mukesh@aps.com |

OUTPUT VARIABLES: DISPLAYS OUTPUT RESPONSE

| Variable Name | Type | Mandatory (Yes/No) | Purpose | Example Output |
|---------------|------|--------------------|--|--|
| Response | Text | Yes | Displays whether the member has been deleted successfully from the list. | Member deleted successfully from the list. |

Guidance for configuring Filter conditions are described below:

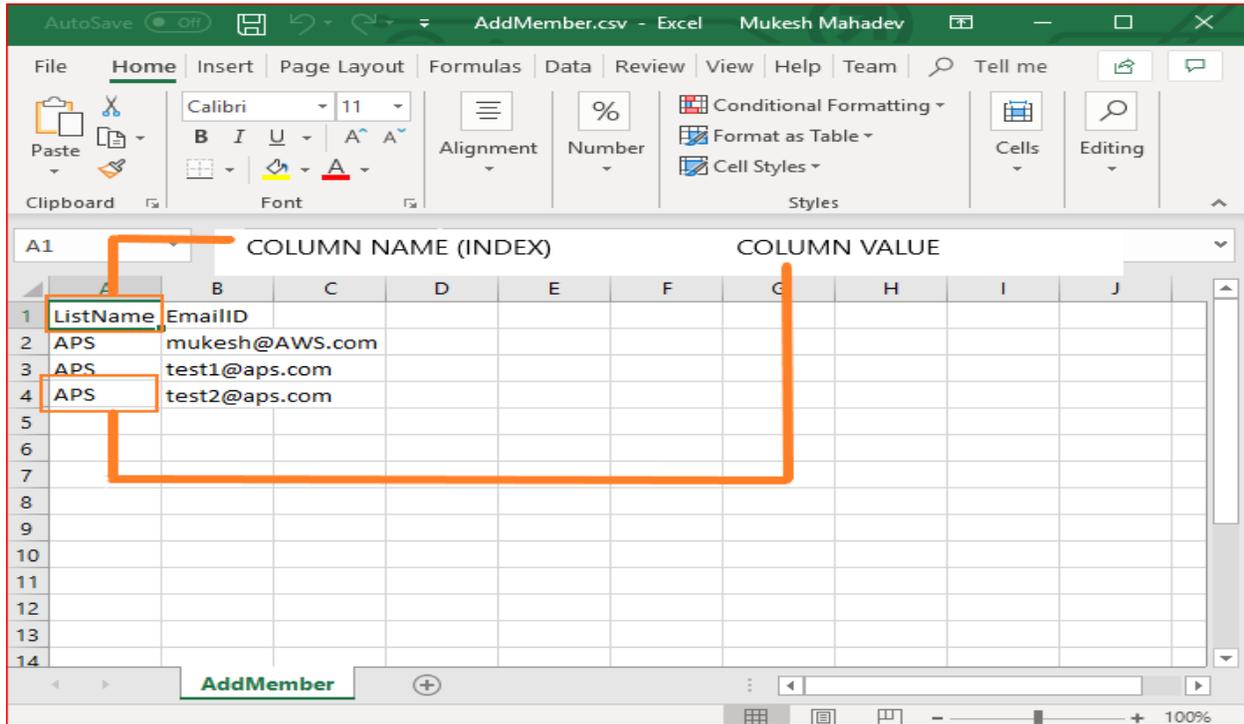
a. Filter based on Column Value

vColumnIndex and **vCompareValue** variables are needed to configure this.

'**vColumnIndex**' is the column name that needs to be defined in task bot.

'**vCompareValue**' is the value that needs to be matched against the mentioned Column name.

Example:



4. Logs



In case of Errors, Error Logs & Screenshots are generated within Error Folder (Highlighted below in yellow)

- My Tasks
 - Bot Store
 - Bot Name
 - Error Folder
 - Logs (Folder)
 - Error Logs Month-Day-Year.txt
 - Snapshots (Folder)
 - Error Snap Month-Day-Year HourMinSec.png

Error Logs will contain the below information -

- Task Name
- Error Line Number
- Error Description
- Generated Timestamp

Example:

| | | | |
|--------------------------|------------------|---------------|------|
| Error Logs 8-21-2019.txt | 21-08-2019 17:27 | Text Document | 2 KB |
| Error Logs 9-26-2019.txt | 26-09-2019 11:28 | Text Document | 1 KB |


```

Error Logs 9-26-2019.txt - Notepad
File Edit Format View Help
(26-09-2019 11:28:29)
=====
Task - C:\Users\Administrator\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store
\MailChimpBot-AppPerfectCorporation\My Tasks\MailChimp Stub_Empty.atmx
Error Line Number: "20"
Error Description: List name is Empty. Please enter list name.
=====
    
```

Note: There are no Custom Logs generated for this Bot.

5. Troubleshooting & Support



Support



Please visit our [Support Portal](#) for any assistance on Bot functionality or Feature.



Automation Anywhere provides a [Product Documentation portal](#) that can be accessed for more information about [AA](#)'s products and guidance on building bots and Digital Workers.

The "Build" section of the portal includes these sections:

- Getting Started - information on building bots recommended practices (including use of the Credential Vault)
- Build Advanced Bots - details on MetaBots and the approach to integrating code into them
- Build Digital Workers - high-level architecture

FAQs



Q: The 'Create Locker' button is not visible in the Credential Vault Page. What do I do?

A: Please check if the role 'Locker Consumer' is assigned to the user and you are using an Enterprise Client version.

Appendix A: Record of Changes

| No. | Version Number | Date of Change (DD/MM/YYYY) | Author | Notes |
|-----|----------------|--------------------------------|-----------------------|-------------------|
| 1 | 1.0 | 23/09/2019 | AppPerfectCorporation | Version 1 Release |

Appendix B: Acronyms

| No. | Acronym | Description |
|-----|---------|-----------------------------------|
| 1 | AA | Automation Anywhere |
| 2 | CSV | Comma Separated File |
| 3 | DW | Digital Worker |
| 4 | CR | Credential Vault |
| 5 | CRM | Customer Relationship Management |
| 6 | API | Application Programming Interface |
| 7 | PC | Personal Computer |
| 8 | RAM | Random Access Memory |
| 9 | OS | Operating System |

Appendix C: References

| No. | Topic | Reference Link |
|------------|------------------------------------|----------------------------|
| 1 | System Requirements - Client | Click here |
| 2 | System Requirements – Control Room | Click here |
| 3 | How to create credential & Locker? | Click here |
| 4 | Credential Overview | Click here |
| 5 | Apeople Community Site | Click here |
| 6 | Product Documentation portal | Click here |