



EXTERNAL

SAP Best Practices for Intelligent Automation for SAP Business One

Activity Creation for Business Partners

Technical Specification

THE BEST RUN



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TECHNICAL OVERVIEW

The Activity Creation for Business Partners bot is an SAP Business One best practice project template for SAP Process Automation, available to users of Web Client for SAP Business One. The bot automatically creates activities for new business partner leads. The bot can also be set to automatically schedule a reminder for the follow-up with new leads in the user's Outlook calendar. Users can schedule this bot to run depending on their specific requirements.

Bot Type

This bot can be set up in unattended mode using SAP Process Automation.

Attended	Unattended	Screen Scraping
No	Yes	Yes

PREREQUISITES

- **Windows Credentials**

You have added a generic credential in Windows Credential Manager for user authentication to SAP Business One by the SAP Process Automation bot. For more information, see *Setting Up Windows Generic Credentials* in the online help for SAP Business One 10.0.

- **SAP Business One**

- In SAP Business One client, in **Business Partners** → **Activity**, you have defined a new activity **Subject** (for example, "Created by SPA bot") (an activity **Subject** in SAP Business One corresponds to an activity **Subcategory** in Web Client). The bot requires a unique activity subcategory to avoid duplications in activities. The activity subject codes that are automatically created by the system for the activity subject correspond to the values to be entered in the "Activity Subcategory Code" column in the configuration file.
- In Web Client for SAP Business One, in **Analytics** → **User-Defined Queries**, you have created a user-defined query with "Business Partner" as the **Category** and "New Lead" as the **Name**. Example SQL and SAP HANA queries are provided in the configuration file on the "DB Query" sheet. To create a tile for the user-defined query on the home page, set the **Default Tile** switch to **Yes**. For more information about creating user-defined queries, see [User-Defined Queries](#) in the Web Client User Guide on SAP Help Portal.

For more information about the configuration file requirements, see *Configuration File* in this section.

- **Root Folder**

You have created a folder with an arbitrary name in the local system that will function as the root folder for the automation. The bot will use the root folder to:

- Create a log folder where log files will be stored

- **Configuration File**

You have downloaded the configuration file that is available in the **Documents** section of the bot project in the [SAP Intelligent RPA Store](#) and placed it inside the root folder. You can also access the bot project and configuration file in the Application Development for SAP Process Automation on the **Store** tab.

The settings for the IRPA bot for Business Partner Activity creation								
Rule	Business Object	Outlook Account	User Name	Activity Subject	Query with Search Perio	Activity Set Date	Set the activity as Reminder in Outlook	Activity Subcategory Cc
1	BP Activity	abc@sap.com	abc	Initial Call	3	4	Yes	2

Note: Details related to each field can be displayed by hovering over the field name.

“Business Object” is the activity that is created to track leads and is a required field.

The fields with green headers include the rules for creating the activity, the predefined text for the activity, the activity subcategory code, and the settings for a reminder about the activity in the user’s Outlook calendar (if activated). The rows are connected using the logical operator “or”, while the columns within a row are connected using the logical operator “and”. You do not need to specify all the values for optional fields with green headers (if a filter value is blank, that filter will be ignored).

In the “Activity Subcategory Codes” column, you have entered the activity **Subject** codes from SAP Business One. The activity subject codes are primary key values that you can find in the OCLS table.

On the “DB Query” sheet of the configuration file, you can find example SQL and SAP HANA queries for the required user-defined query in Web Client.

When adding the scheduled trigger for the bot in the Application Development, you need to specify the name of the configuration file as the variable “WorksheetName”. The configuration file must be closed while running the bot.

SOFTWARE REQUIREMENTS

- Microsoft Excel
- Microsoft Outlook (if reminders in the Outlook calendar are to be activated)
- Application Development for SAP Process Automation. For more information, see [Subscribing to SAP Process Automation](#) in the application help for SAP Process Automation on SAP Help Portal (EN only).
- Desktop Agent 2.0.20 or higher. For more information, see [Install Desktop Agent to Run Automations](#) in the application help for SAP Process Automation on SAP Help Portal (EN only).

BOT SETUP

1. Acquire the Activity Creation for Business Partners project from the [SAP Intelligent RPA Store](#). You can also acquire the project in the Application Development for SAP Process Automation on the **Store** tab.
2. Deploy the bot and add a scheduled trigger.
3. Register and add an agent.
4. Wait for the scheduled trigger or start a bot run immediately (in **Monitor** → **Automations**, click the **Actions** icon and choose **Run now**).

For more information on steps 1-3, see *Setting Up and Deploying Best Practices Template Bots in the Application Development* in the online help for SAP Business One 10.0.

Trigger Input Parameters

The following table provides details on the trigger input parameters for SAP Process Automation that are required for running the bot.

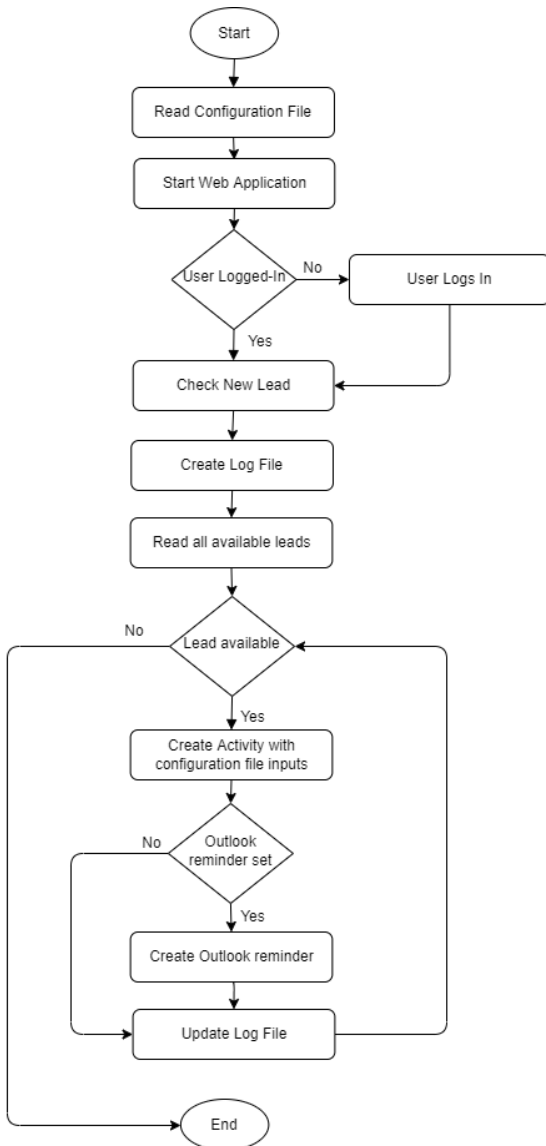
Trigger Variable Name	Type	Sample Value	Description
ApplicationURL	Text	https://xx.xxx.xxx.xxx:123	The web address of the Web Client for SAP Business One to be accessed by the bot.

Trigger Variable Name	Type	Sample Value	Description
B1CredEntryName	Text	B1_Credentials	The name you provided for the credentials you set in Windows Credential Manager in the <i>Internet or network address</i> field. Note that the credentials information needs to be set as the SAP Business One user name and password.
CompanyName	Text	Company_A	The name of the company.
WorkSheetName	Text	Config.xlsx	The name of the configuration file to be used by the bot.
LogFilePath	Text	C:\Users\Desktop\SPA	The root folder location where the configuration file is stored.
WorkBookPath	Text	C:\Users\Desktop\SPA	The configuration file path.

COMPONENTS

Library	Type	Comments
Excel	Read	Used to get input data from the end user.
Excel	Write	Used to write/create/modify files during the bot run.
Outlook	Read	Used to manage the user's Outlook calendar by adding reminders for follow-ups with new leads.

BOT WORKFLOW



OUTPUT AND LOGS

- **Logs**

The bot creates a folder named “Logs” inside the root folder to store the log files for each bot run.

Note: Log files should not be opened while running the bot.

- **Outlook Calendar**

The bot schedules a reminder for the follow-up of new leads in the user’s Outlook calendar (if activated in the configuration file).

CONSTRAINTS

- This bot can only work on a Microsoft Windows operating system.

SECURITY

Certain configuration scenarios require a technical user. In such cases, every natural person needs a separate technical user (for example, a separate communication arrangement). The user should not share their credentials with any other natural person.

For security-relevant information that applies to SAP Process Automation, see [Security](#) in the application help for SAP Process Automation on SAP Help Portal (EN only).

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