RPA Design and Development

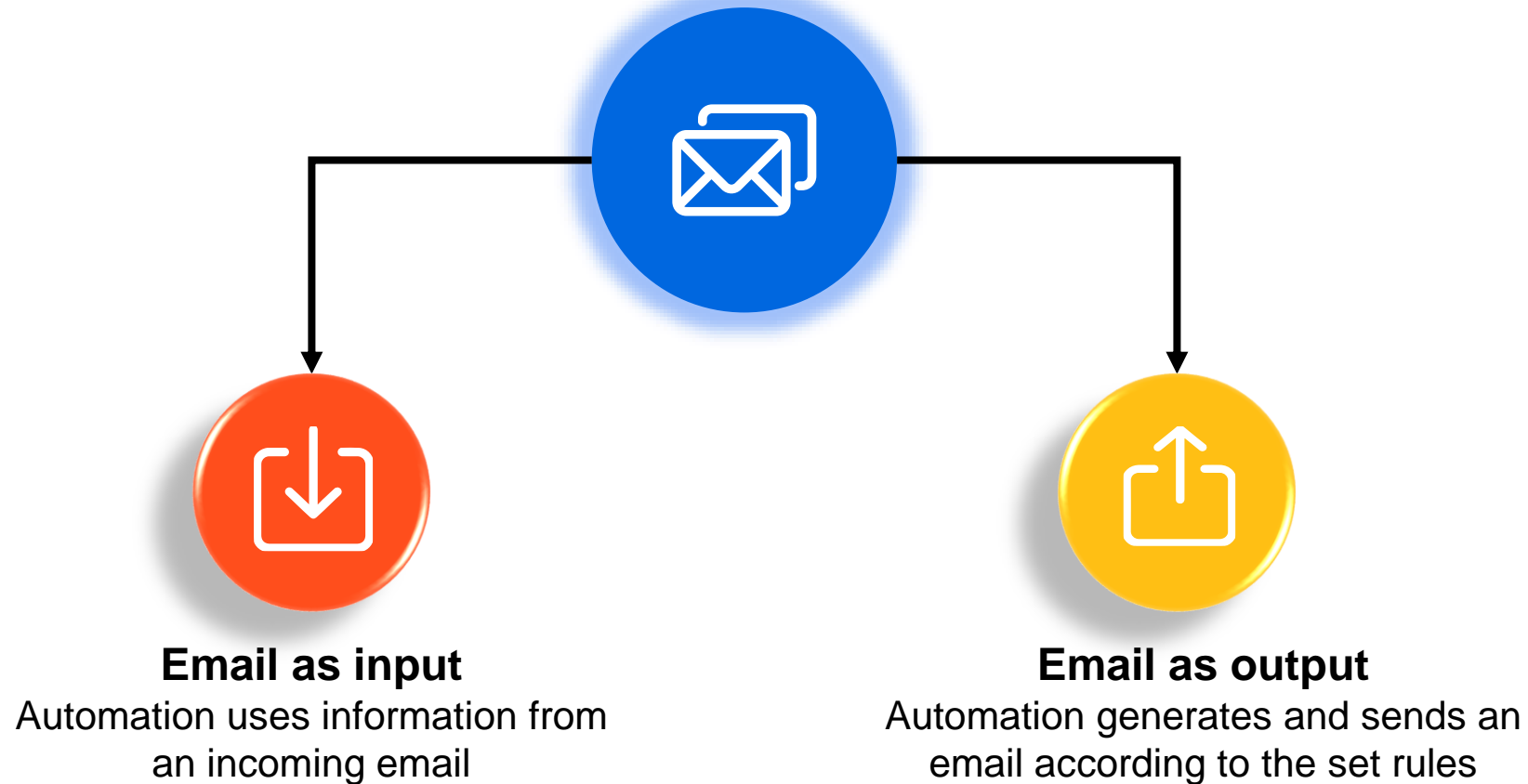v4.0

UiPath

Lesson 12   Email Automation

Email Automation - Exam Topics

1. Get IMAP and POP3 Emails and send SMTP Mail Messages.

2. Get, Send and Manage Microsoft and Gmail Integration Emails.

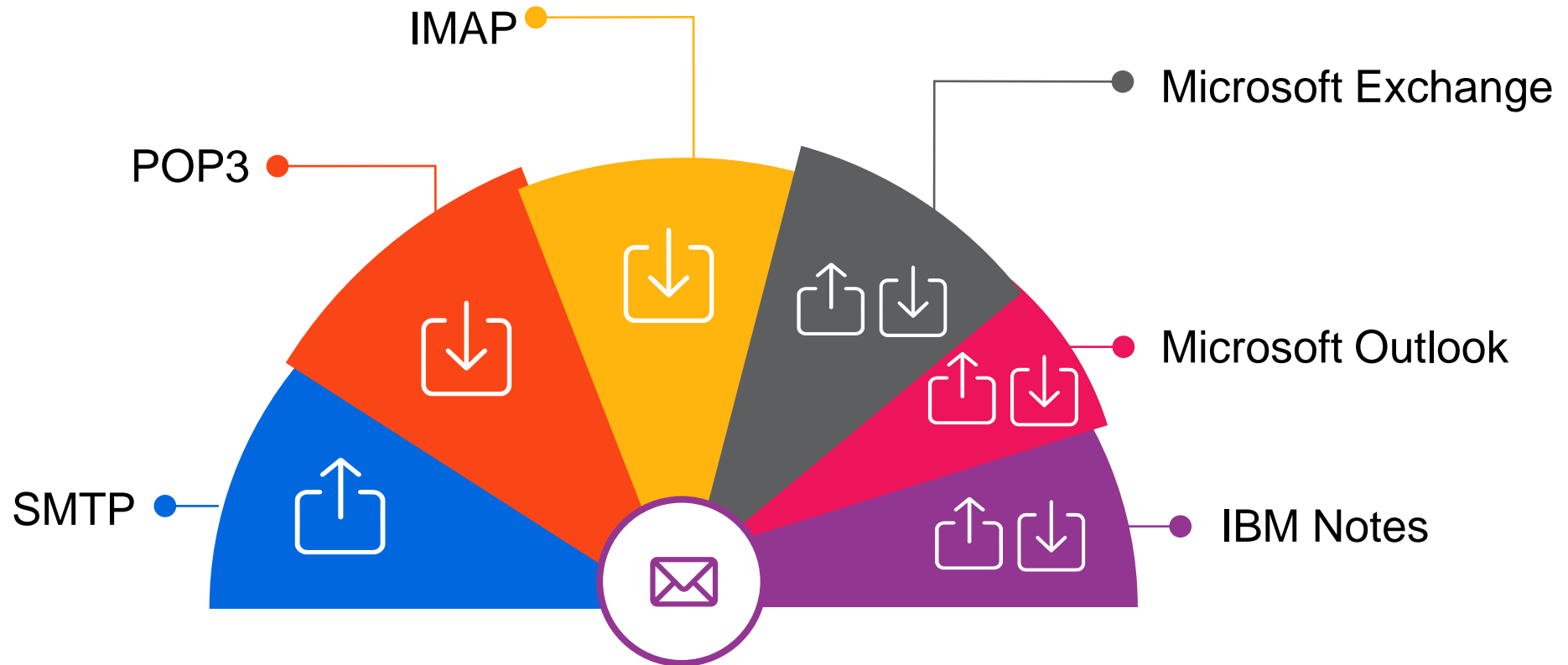3. Use Microsoft 365 and Gsuite packages.

Email Automation

The process of automating several tasks related to emails in order to handle them efficiently with minimal effort. Two situations for interacting with emails are:

Email as input
Automation uses information from an incoming email

Email as output
Automation generates and sends an email according to the set rules

Email Protocols

Email protocol is a method by which a communication channel is established between two computers, and email is transferred between them. Depending on the scope of automation, different sets of activities and protocols can be used. The email protocols are:

IMAP

POP3

SMTP

Microsoft Exchange

Microsoft Outlook

IBM Notes

Categories for Email Automation

Studio includes activities for sending, retrieving and organizing messages. The available categories are:

Generating & sending automated messages
Done using:
- SMTP
- Outlook
- Exchange
- IBM Notes

Retrieving messages & extracting data
Done using:
- POP3
- Outlook
- IMAP
- Exchange
- IBM Notes

Managing messages
Done using:
- Outlook
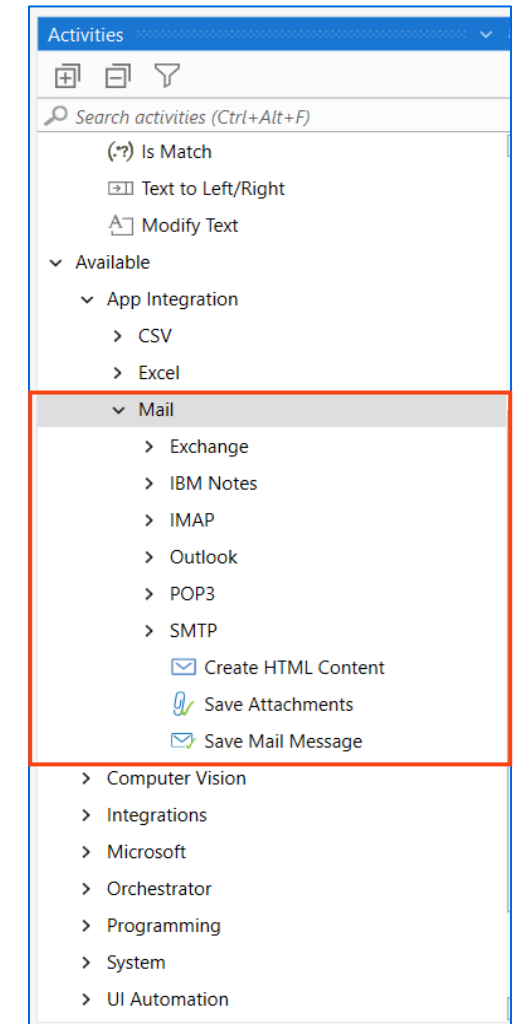- IMAP
- Exchange
- IBM Notes

Saving attachments
Done using:
- Generic Email Activities

Saving messages
Done using:
- Generic Email Activities

Email Protocols and Related Activities

UiPath

SMTP

- Simple Mail Transfer Protocol

- Mail servers and other mail transfer agents use the SMTP protocol to send mail messages on TCP port 25

- Email as output. SMTP can be used with Gmail to send emails

- **Studio Activity:**

  - Mail
    - **SMTP**
      - Send **SMTP** Mail Message

POP3

- Post Office Protocol

- Protocol for reading messages

- Input via email. POP3 can be also used to retrieve email from Gmail

- **Studio Activity:**

  - Mail
    - **POP3**
      - Get **POP3** Mail Messages

IMAP

- Internet Message Access Protocol

- Offers useful features to mark messages as read or move them between folders

- Input via email. IMAP can be also used to retrieve email from Gmail

- **Studio Activities:**

  - Mail
    - **IMAP**
      - Get **IMAP** Mail Messages
      - Move **IMAP** Mail Message

Email Protocols and Related Activities (Contd.)

Ui Path

Microsoft Exchange

- Microsoft's enterprise email solution
- Sends and receives emails
- **Studio Activities:**

∨ Mail
  ∨ **Exchange**
    ✉ Delete **Exchange** Mail Message
    ✉ **Exchange** Scope
    ✉ Get **Exchange** Mail Messages
    📁 Move Message To Folder
    ✉ Send **Exchange** Mail Message

Microsoft Outlook

- Personal information manager from Microsoft
- Used as an email client
- Sends and receives emails
- **Studio Activities:**

∨ Mail
  ∨ **Outlook**
    ✉ Delete **Outlook** Mail Message
    ✉ Get **Outlook** Mail Messages
    ✉ Mark **Outlook** Mail As Read/Unread
    ✉ Move **Outlook** Mail Message
    ✉ **Outlook** Mail Message Trigger
    ✉ Reply To **Outlook** Mail Message
    ✉ Save **Outlook** Mail Message
    ✉ Send **Outlook** Mail Message
    ✉ Set **Outlook** Mail Categories

IBM Notes

- Personal mail, calendar, and schedule manager
- Desktop workflow application that provides instant messaging, emails, calendars, blogs, etc.
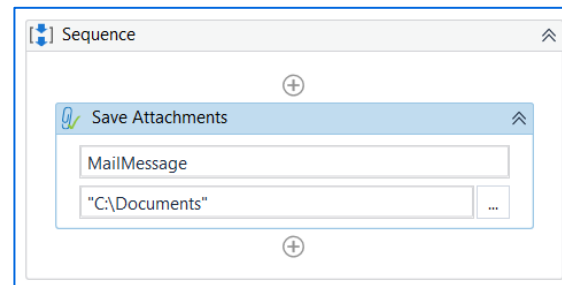- **Studio Activities:**

∨ Mail
  ∨ **IBM** Notes
    ✉ Delete **IBM** Notes Mail Message
    ✉ Get **IBM** Notes Mail Messages
    📁 Move **IBM** Notes Mail Message
    ✉ Send **IBM** Notes Mail Message

Categories for Email Automation

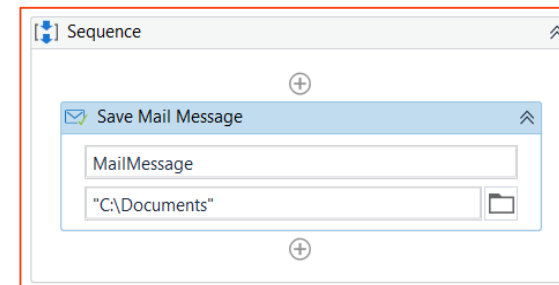There are two generic email activities available for saving email attachments and email messages on the local drive.

Save Attachments

- Saves the mail message attachments to the specified folder

Save Mail Message

- Saves the email message to the specified folder

Classroom Exercise

Demonstrate the use of **Get IMAP Mail Messages** by extracting information(From, Subject, and Body) from emails and storing it in a CSV file.
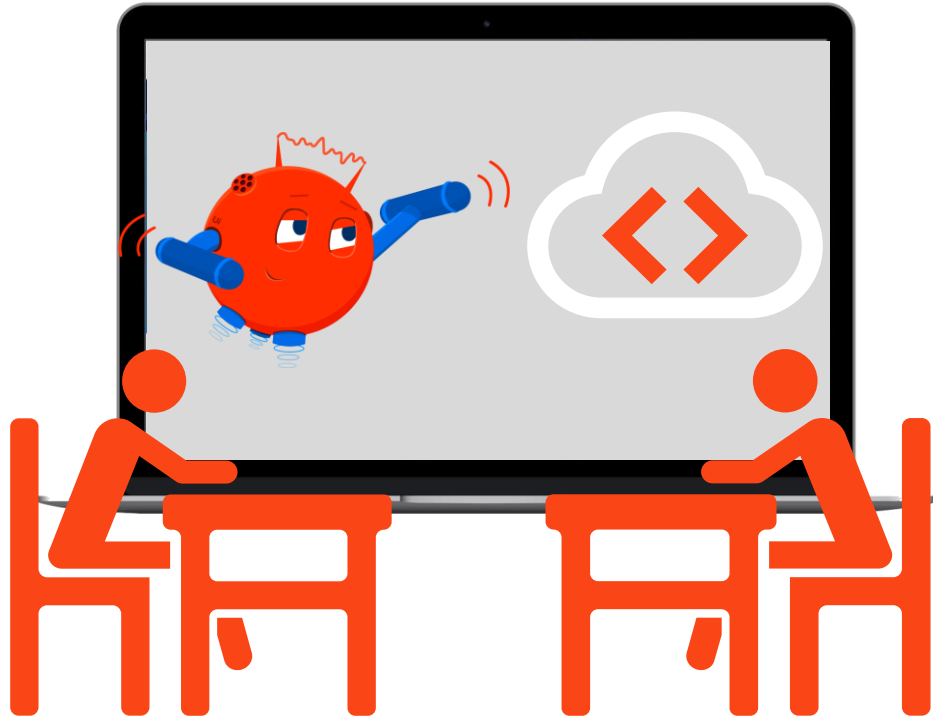- Set up an IMAP configuration to access the email
- Loop through each email and extract From, Subject, and Body
- Store extracted data in an excel file in three different columns with header names as From, Subject, and Body

Classroom Exercise

Demonstrate the use of **Get Outlook Mail Messages** by extracting information(From, Subject, and Body) from emails and storing it in an Excel file.

- Use the Get Outlook Mail Messages activity to identify Outlook mail folder
- Loop through each email and extract From, Subject, and Body
- Store extracted data in an excel file in three different columns with header names as From, Subject, and Body

Practice Exercise

Build a workflow that extracts attachments from emails containing the word "Resume" in its subject.
- Set up IMAP configuration to access the email.
- Loop through each email to identify subjects containing the word "Resume"
- Download the attachments from the identified emails in a folder

Note: Send 4-5 Test emails to the email ID that you will use for practice. Emails must contain file attachments and the word "Resume" in their subject