**Use Case**

GlobalCorp held a seminar and invited a select group of companies to attend. The ultimate goal was to have these companies purchase a new product, XYZABC.

To see if any companies were interested in purchasing the XYZABC product, at the end of the seminar, GlobalCorp employees handed out a survey. The last survey question asked if the company wanted to buy the XYZABC product now.

GlobalCorp uses Salesforce.com as the CRM and wants to ensure all of the companies in attendance are in this system for future marketing purposes. GlobalCorp also uses QuickBooks for accounting and invoicing purposes.

GlobalCorp wants to use RPA to:

* Scan all of the received surveys
* Add those companies that are not already in Salesforce
* If the company is in Salesforce, track if the address information is different
* Attach the survey file to the company account in Salesforce
* For those companies that want to purchase the product **now**, ensure that the company is in Quickbooks
* If they are not in QuickBooks, then add the company
* If the company is in QuickBooks, but the address information is incorrect, track the information
* Add in the Notes field, “**Purchase XYZABC Product Now**”
* Have a final report with the invoices that were successfully uploaded in Salesforce and QuickBooks, and those companies with mismatched information

**Salesforce Process**

**To access Salesforce:**

URL: https://solugenix2.my.salesforce.com/  
 User name: stephen.booze-mcpe@force.com  
 Password: Solugenixis#1

**To Lookup a Company (Account) Name:**

* Enter the company name in the **Search** field

Graphical user interface

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* If the company is in Salesforce, the name will show in the Account Name field

Graphical user interface, text, application, Word, email

Description automatically generated

* To get the address/details, click on the name, and you will be taken to the **Account** tab. On this screen, you will see the company address and phone number

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* To get to the field level of the address, click the **Edit** button

Graphical user interface, text, application, email

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* In this window, you will have the detailed address information (you will need to scroll down to see the address information). This is where you will validate the address and phone information

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* To add a file to the Account, scroll to the bottom of the Account page and click the **Upload File** button

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* If the company is not in Salesforce, click the Accounts tab and select **+New Account.** From there, enter the company information, and then attach the survey file from the Account screen

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**QuickBooks Process**

**To access QuickBooks:**

URL: https://app.qbo.intuit.com/app/login  
 User name: stephen.booze@solugenix.com   
 Password: Solugenix1!

* Click on the Solugenix button

Graphical user interface, application, Word

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* To search for a company, click the **Customers & leads** link, then select **Customers**

Graphical user interface, application

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* Use the Search field to lookup a customer

Graphical user interface, website

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* You will see the customer details on the screen, or you can click the Edit button to get the field level

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Graphical user interface

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* If the customer is not in QuickBooks, go to the Customers & leads page and click New Customer and add the appropriate information

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* To add a note, search for the company and click on the Add notes link

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