

Contacts Recognition and Upload to Salesforce



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[Download Example](#)

Example Overview

Problem Statement

When you meet a lot of people on some conference or another public activity, they give you their business cards, but you don't have a lot of time to look at and remember all of these people. Still, you can store cards in your pocket or wallet and after some time look at them and sort out needed contacts. Then, perhaps, you want to save all the contacts to your enterprise CRM system to make business with these people further.

Existing Manual Process

Usually, you need to enter all of the contacts from all your cards into your system manually. It's not a big deal in case of a few cards, but if you have dozens of them everyday, it becomes a routine that takes time. Our sample provides approach showing how to automate this manual task.

Automation Solution

Bot processes existing cards that are stored in the .png format according to predefined templates. After that, all the recognized contacts are collected in a .csv file to be uploaded to Salesforce. Unrecognized contacts which have not been associated with any of the existing templates are collected into another file for manual check. Bot uploads the recognized contacts using a specific Salesforce account with two-factor authentication.

In this example

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components:

- Login to Salesforce
- Verify Salesforce account
- Upload output file to Salesforce

Preconditions

Install to your PC:

- WorkFusion Studio (Intelligent Automation Cloud Express /Business)
- Chrome or Firefox
- MS Outlook (a version doesn't matter). The email account should be configured and logged in providing a bot with the option to send emails.

To play the sample, you need to have a Salesforce account that should be linked to your account in MS Outlook to receive a verification code via email.

Make sure that OCR is running before script execution.

Example Workflow

- [Script documentation](#)

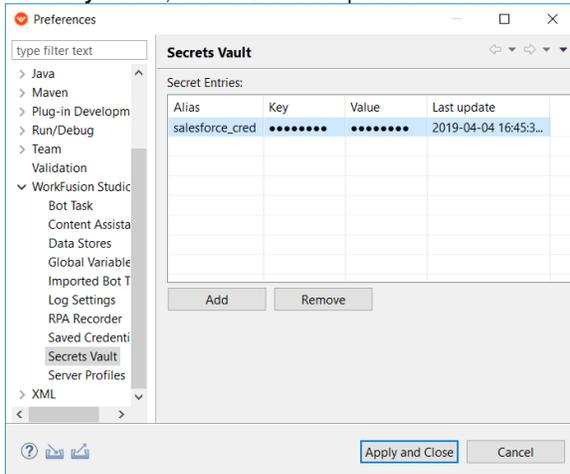
Example Overview Video

See the video showing how our bot works.

Installation and Getting Started

i Due to the specifics of the OCR action, some settings in the script might not work out of the box. To be on the safe side, check the version of your Intelligent Automation Cloud Express /Business and browse through the OCR actions in the script. In case anchor regions are displaced, you should allocate them manually. For more details, refer to the [OCR action](#) description.

1. Extract the sample folder and drop it into your default Workspace in WorkFusion Studio (C:\Users\name\workfusion-workspace\rpae_project).
2. Open the sample in WorkFusion Studio.
3. Go to **Window > Preferences**, expand **WorkFusion Studio**, and select the **Secret Vault** tab.
4. Press the **Add** button and enter `salesforce_cred` as **Alias**. Enter the Salesforce username in the **Key** column, and the Salesforce password in **Value**.



5. Press **Apply and Close**.
6. Copy input files from the folder **images** to any appropriate folder and edit the following variables:
 - a. `folder_path` – the path to the input files with business cards images
7. Click on the **Play recording** button.