How To Automate CRM Data Entry

Learn how to automate your CRM Data Entry in just a few steps with this free checklist.



- [ ] Create a free Docparser account at https://app.docparser.com/account/
- [ ] Upload your first document and set data extraction rules
- [ ] Integrate your CRM with Docparser
- [ ] Set your documents to forward to Docparser automatically
- [ ] If Zapier is needed, create an account and integrate
- [ ] Set new workflow in motion and watch new CRM entries appear automatically

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