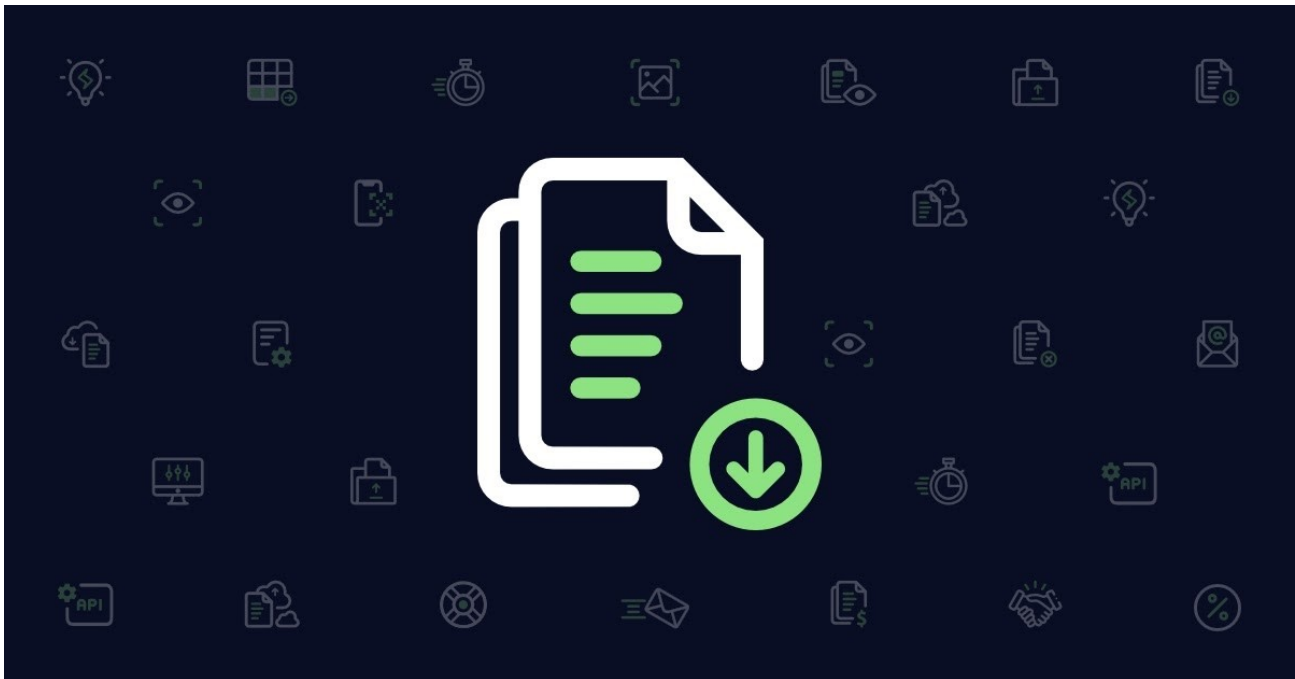


How To Automate CRM Data Entry

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