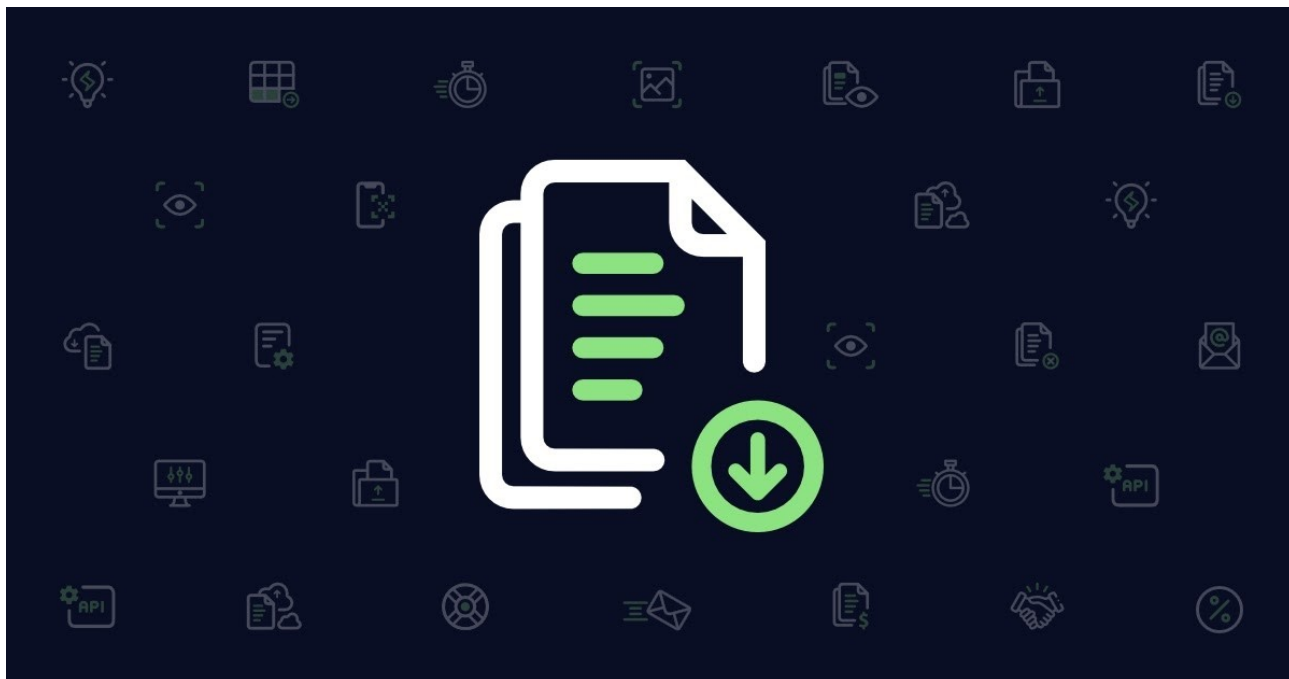# How To Automate CRM Data Entry

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