

Leads > Boarding > Merchants > Maintenance > Residuals



IRIS CRM®

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Calculate Residuals In Minutes Instead Of Days

Create IRIS CRM Lead From New Business Card Transcribed In Contacts+

Contacts+ allows you to import scanned business cards which are then transcribed by human operators and added as new contacts. You can create a zap to automatically create an IRIS CRM lead each time a new business card is transcribed in **Contacts+**.

1. In Zapier, select **Contacts+** as the Trigger app and select **New Business Card Transcribed In Contacts+** as the trigger:

The screenshot shows the Zapier trigger configuration interface. At the top, it says "When this happens ..." followed by "1. New Business Card Transcribed in Contacts+". Below this is a section titled "Choose App & Event". Under "Choose App (required)", a dropdown menu is set to "Contacts+". Under "Choose Trigger Event (required)", a dropdown menu is set to "New Business Card Transcribed". A blue "CONTINUE" button is at the bottom.

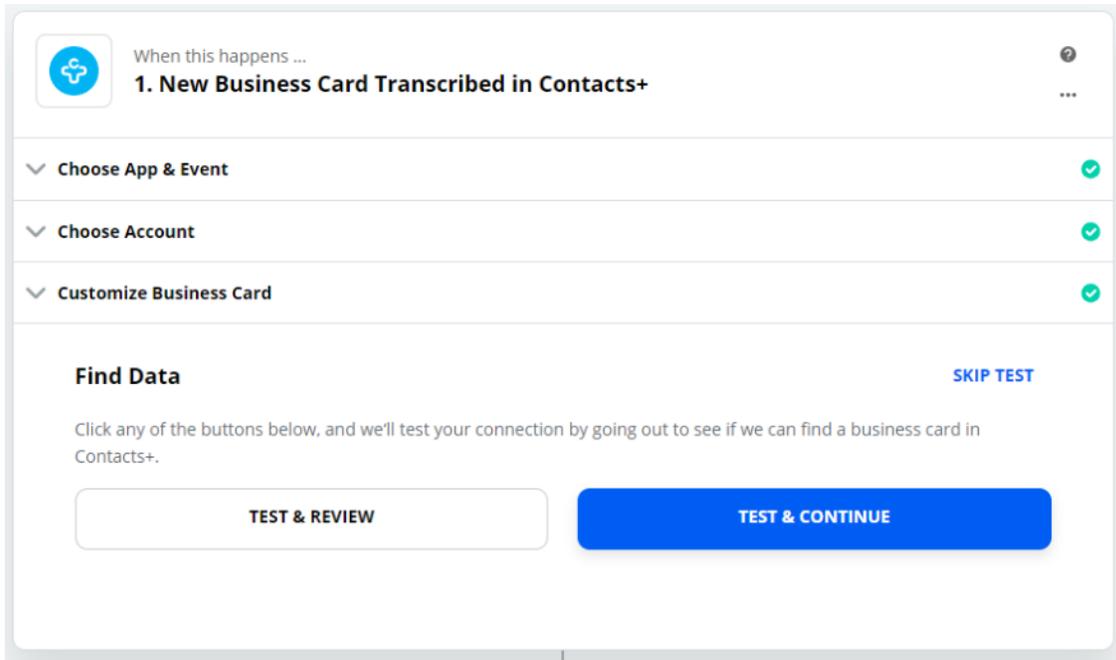
2. Sign into Contacts+:

The screenshot shows the Zapier authentication screen. It has the same header as the previous screen. Below the header, there is a section titled "Choose App & Event" with a dropdown arrow and a green checkmark. Underneath is a section titled "Choose Account". A blue button with the Contacts+ icon and the text "Sign in to Contacts+" is prominent. Below the button, there is a lock icon and the text: "Contacts+ is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)" At the bottom, there is a grey button with the text "TO CONTINUE, FINISH REQUIRED FIELDS".

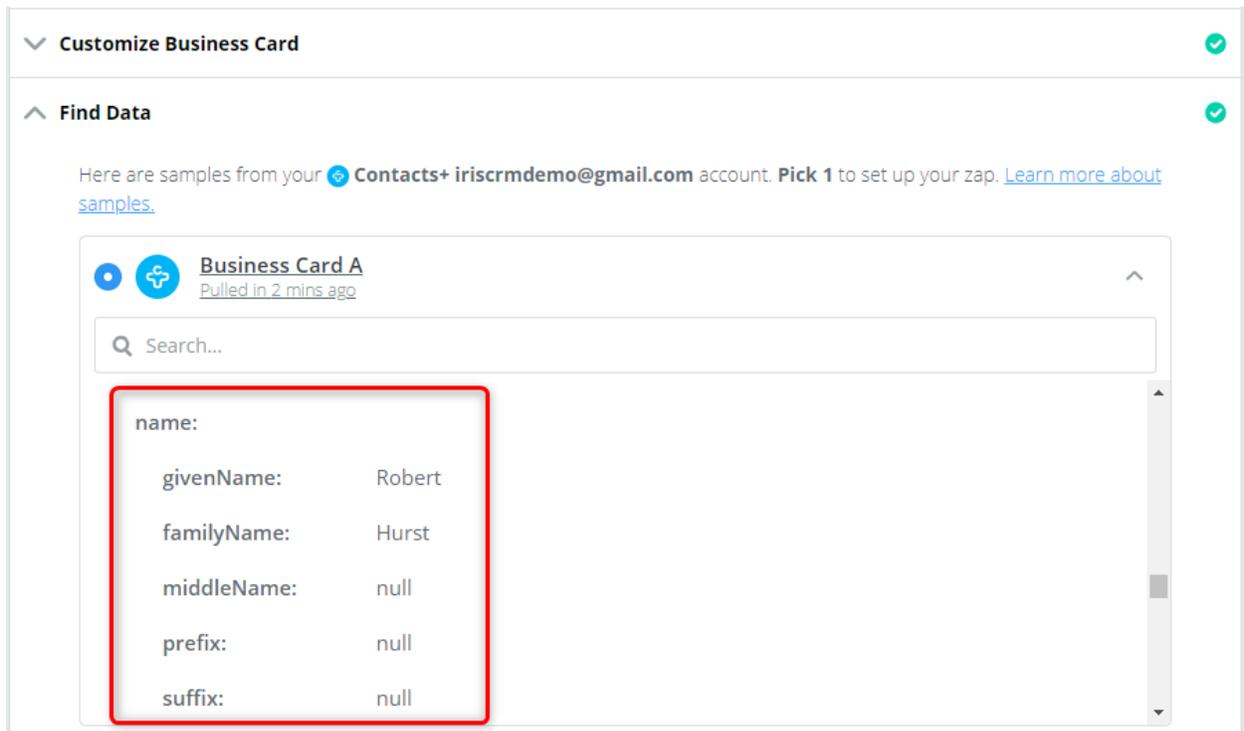
3. If you've set up multiple teams in **Contacts+**, you can select a Team whose contacts you wish to import into IRIS CRM (leave empty to use all Teams). You can also choose to process only the business cards with specific tags (optional):

The screenshot shows a configuration window for a trigger. At the top, there is a header with a blue icon of a person with a plus sign, the text "When this happens ...", and the title "1. New Business Card Transcribed in Contacts+". To the right of the header are a help icon and a menu icon. Below the header are two expandable sections: "Choose App & Event" and "Choose Account", both with green checkmarks. The main section is titled "Customize Business Card". It contains a "Team (optional)" dropdown menu with a downward arrow. Below it is a note: "Select the team you want this trigger to work with, otherwise leave it blank for your personal contacts." Below that is a "Tags (optional)" dropdown menu with a downward arrow, and to its right are two buttons: a minus sign (-) and a plus sign (+). Below the tags section is another note: "A list of tags that this trigger should be limited to. This will trigger when any one of these tags are added." At the bottom left of the main section is a "Refresh Fields" button with a circular arrow icon. At the very bottom is a large blue "CONTINUE" button.

4. Click **Test & Review** to load a business card with which you will test the zap once it has been configured:



Here is an example of a sample business card and the information that is pulled in from Contacts+.



5. Having configured the trigger event, you can now select the Zapier action that will take place when the trigger is activated.

Select the **IRIS CRM** app and the **Create New Lead** action:

Do this ...
2. Create New Lead in IRIS CRM

Choose App & Event

Choose App (required)
IRIS CRM

Choose Action Event (required)
Create New Lead

CONTINUE

6. Next, sign in to your CRM:

Do this ...
2. Create New Lead in IRIS CRM

Choose App & Event

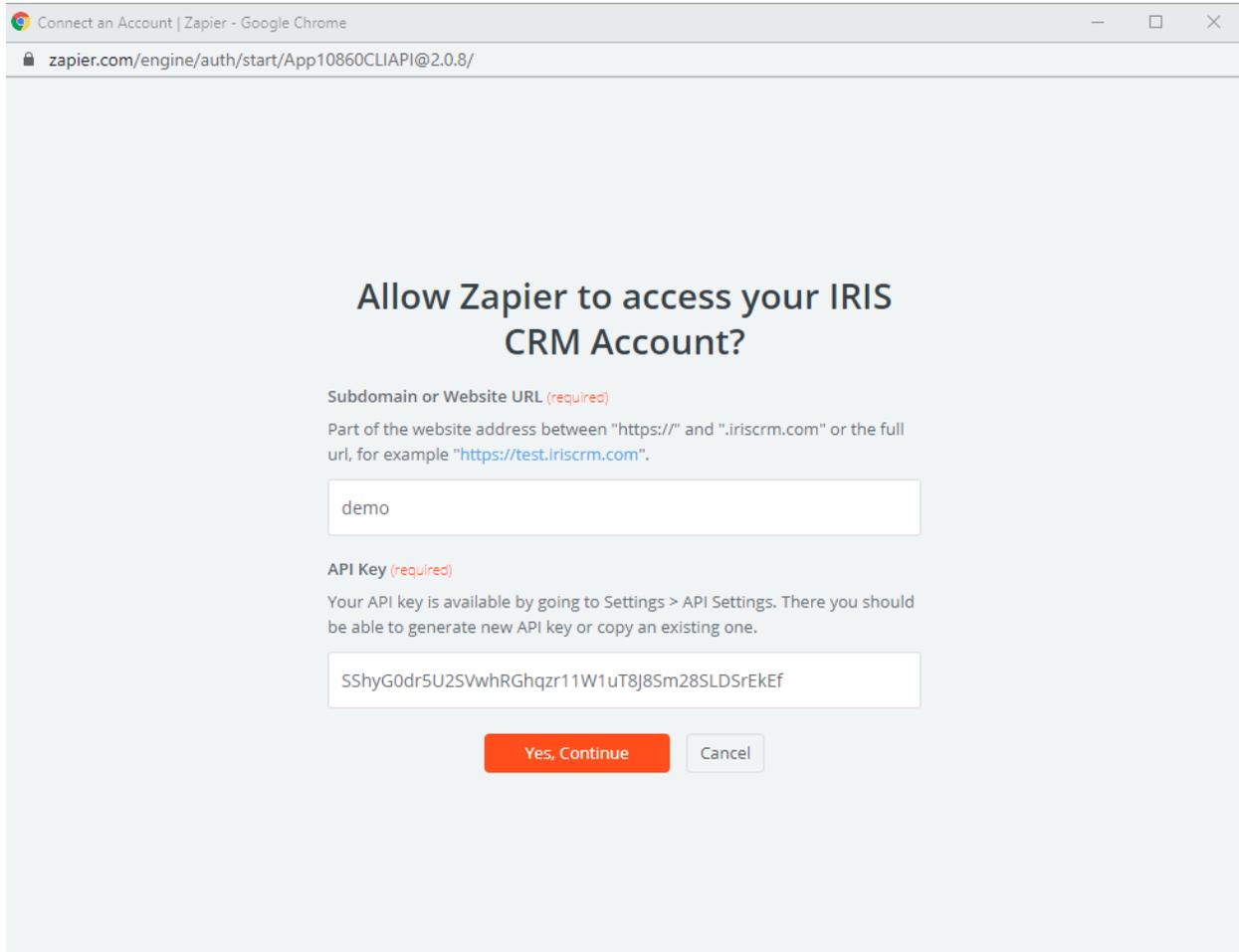
Choose Account

Sign in to IRIS CRM

IRIS CRM is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

TO CONTINUE, FINISH REQUIRED FIELDS

You will need to enter your domain name and the API key, which you can generate from the User Settings page. More info: <https://help.iriscrm.com/hc/en-us/articles/115004979628-User-Settings-and-Notifications#API-Settings>



Connect an Account | Zapier - Google Chrome

zapier.com/engine/auth/start/App10860CLIAPI@2.0.8/

Allow Zapier to access your IRIS CRM Account?

Subdomain or Website URL *(required)*

Part of the website address between "https://" and ".iriscrm.com" or the full url, for example "https://test.iriscrm.com".

API Key *(required)*

Your API key is available by going to Settings > API Settings. There you should be able to generate new API key or copy an existing one.

7. In order to create a new lead, the DBA, Groups, and Status fields must be filled in. You can map your IRIS CRM lead **DBA** field to the Contacts+ **Organization** field, and then select the appropriate Group and Status using the provided dropdown menus:

^ **Customize Create New Lead** ✔

Create a new lead in IRIS CRM. You must specify the Group, Status, and values for any other required fields. You may also assign users and set the campaign, source, and other lead field values. Example use: create a lead in IRIS CRM when a record is created in an external system.

DBA (required)

1. Organization: Phoenix Specialty Mfg. Co. ☰

Group (required) 1 2 3

NYC ISO ▼

Choose a group or specify a group ID.

Status (required) 1 2 3

Qualifying - New ▼

Choose a status or specify a status ID.

Users to assign (optional) 1 2 3

▼ -

8. Next, click on the + button to add and map additional IRIS CRM fields that will be populated with the Contacts+ data. For each new IRIS CRM field, you will also need to select the corresponding Contacts+ field:

Other lead fields (optional) 1 2 3

Business Information - Contact First Name	▼	▼	-
Business Information - Contact Last Name	▼	▲ ▼	-
Business Information - Contact Title	▼	▲ ▼	-
Business Information - Business Phone	▼	▲ ▼	-
Business Information - Contact Email	▼	▲ ▼	-
Business Information - Website	▼	▲	-
			+

Choose fields to load and enter values below.

Business Information - Contact First Name (optional)

1. First Name: Robert

Business Information - Contact Last Name (optional)

1. Last Name: Hurst

Business Information - Contact Title (optional)

1. Title: President

Business Information - Business Phone (optional)

1. Work Phone: +1 803-245-6344

9. You can now test your flow by sending a sample business card (selected in Step 4) to IRIS CRM. Make sure that the DBA, Group, and Status fields are not empty (eg. if the sample business card does not have those fields filled in), or otherwise the lead will not be created.

If all of the information in the sample business card is accurate, click **Test & Review**.

Send Data SKIP TEST

Send Test Create New Lead to IRIS CRM

To test IRIS CRM, we need to create a new create new lead. This is what will be created:

DBA:	Phoenix Specialty Mfg. Co.
Group:	NYC ISO
Status:	Qualifying - New
Users to assign:	
Campaign:	
Source:	
EMPTY FIELDS:	
Users to assign:	empty (optional)
Campaign:	empty (optional)
Source:	empty (optional)
Business Informati...	empty (optional)
Business Informati...	empty (optional)
Business Informati...	empty (optional)

TEST & REVIEW

TEST & CONTINUE

10. If the test is successful, you will see a confirmation message:

Send Data



Test was successful!
We'll use this as a sample for setting up the rest of your Zap.

A Test create new lead was sent to IRIS CRM about 10 seconds ago.

We created a create new lead! We were able to create a create new lead in your IRIS CRM account.

Q Search...

leadId:	1519548
message:	The Lead (1519548) has been created successfully
leadUrl:	https://dev.iriscrm.com/lead/view/1519548

RETEST & REVIEW

RETEST & CONTINUE

You can also open your CRM and verify that the new lead has been created, and all of the fields you mapped have been populated accurately:

New Lead Received

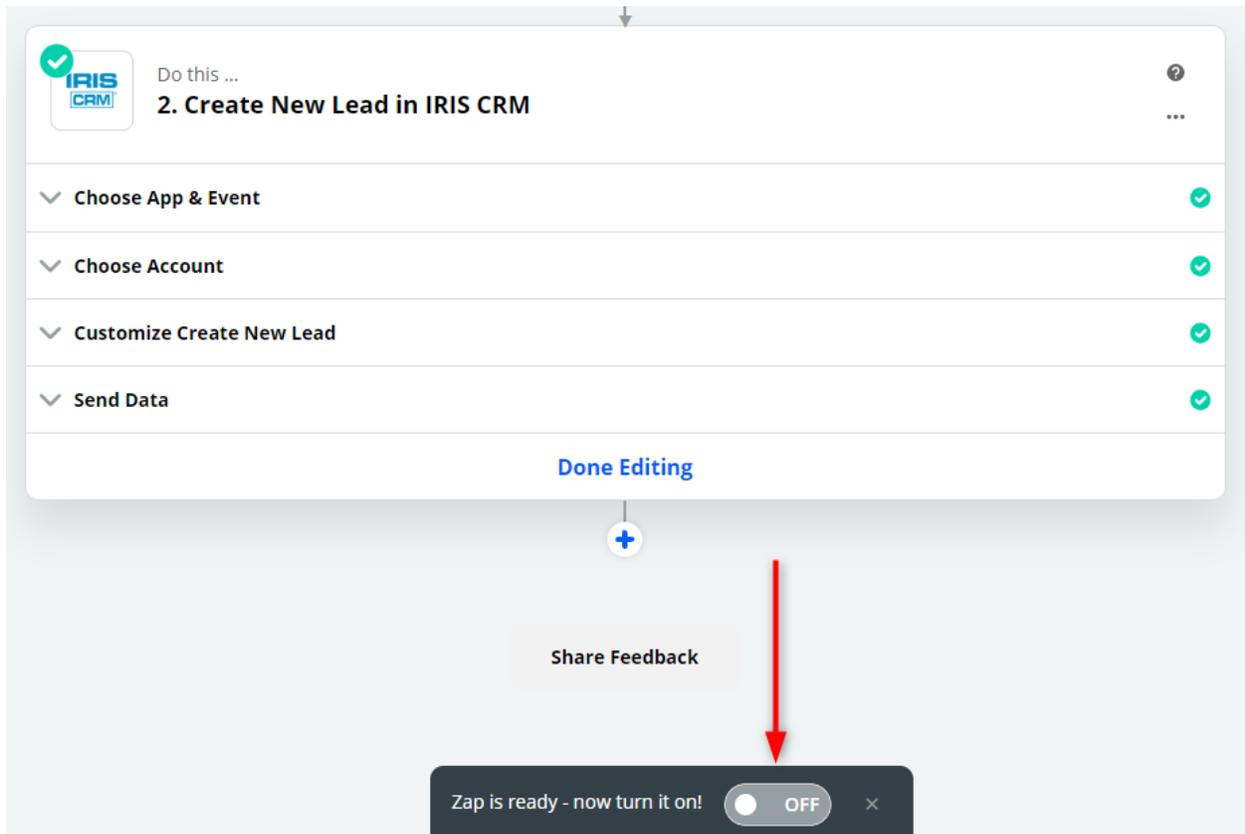
Phoenix Specialty Mfg. Co.

Contact Email:
hurst@phoenixspeciality.com

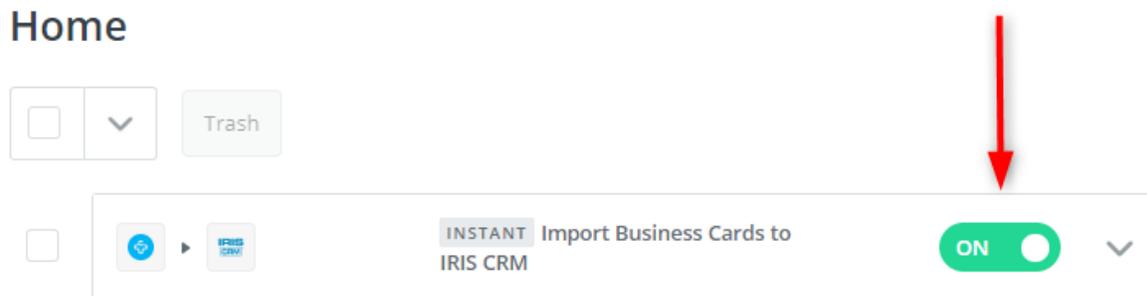
[Call](#) [More ▾](#)

January 11, 1:31 pm

11. Your new Zap is now ready and you can enable it, so that it continues to run automatically:

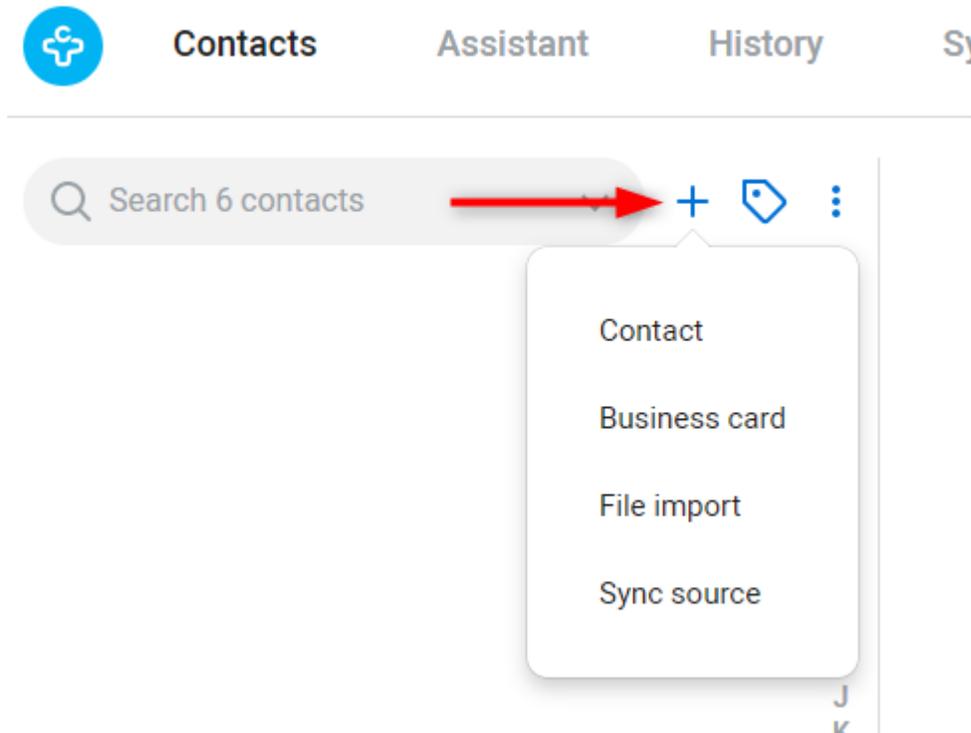


You can also enable or disable the Zap from your Home page at any time:



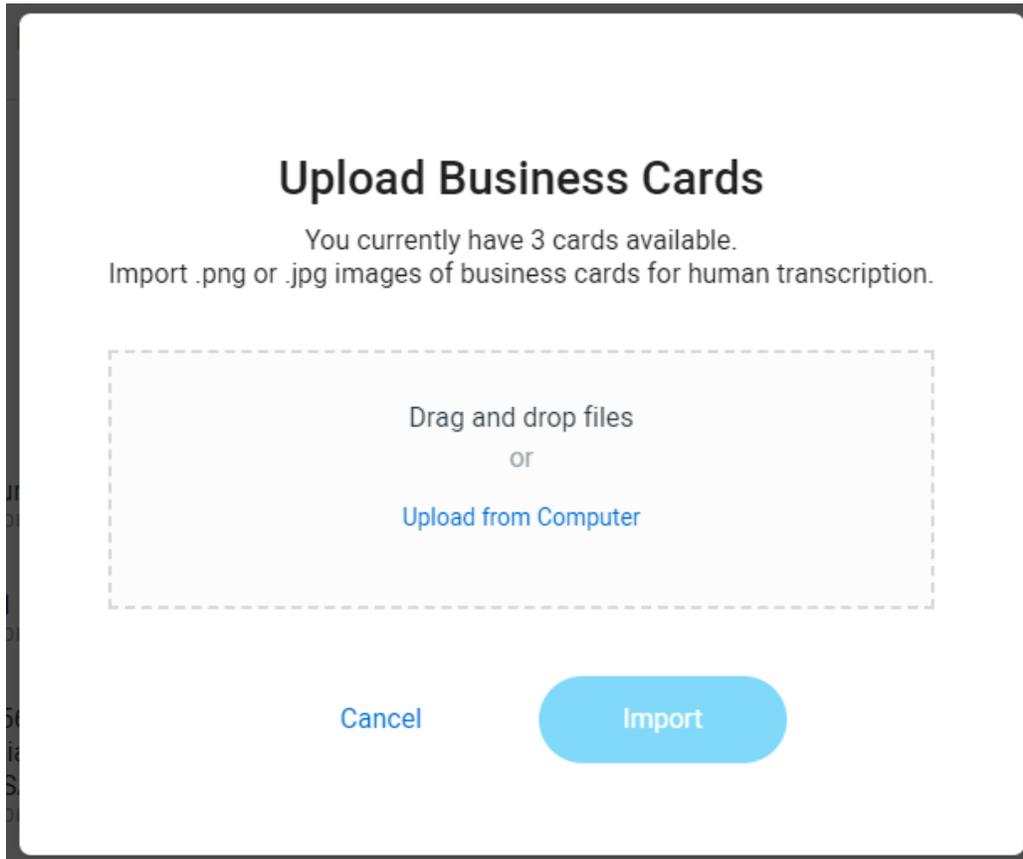
12. With the Zap enabled, you can now continue to add business cards in your Contacts+ account, after which they will be added as new leads in IRIS CRM automatically.

To import a scanned business card from your desktop click on the + symbol in **Contacts+**, and click **Business Card**:



Note: You can also import business cards easily by using the Contacts+ mobile app and simply taking a picture of the business card.

13. Select the business card from your desktop and click Upload:



Here is an example of an imported business card:



14. Once the business card is transcribed, your new contact will be shown in the contacts list:



Robert Hurst
Phoenix Specialty Mfg. Co., President

 hurst@phoenixspeciality.com
WORK

 +1 803-245-6344
WORK

 856th street
Miami, FL 88778
USA
WORK

 **Refer Robert**
to get more business card
and clean up scans.

 [Add a note](#)

 [Add tag](#)

2020 Conference x

 [Want to see bios and recent Tweets?](#)
[No Thanks](#) [Connect Twitter](#)

15. Finally, a new lead is added in IRIS CRM with the lead info from the business card:


Leads ▾
New Lead
Calendar
TurboApp ▾
Tools ▾
Residuals ▾
Helpdesk
D

Phoenix Specialty Mfg. Co. 

Business Information
Site Survey
Financial Profile
Owner (0)
Pricing

DBA *	Phoenix Specialty Mfg. Co.		
Contact First Name	Robert	Contact Last Name	Hurst
Contact Title	President		
Business Phone	803-245-6344	 	
Contact Email	hurst@phoenixspeciality.com   		
Website	http://www.phoenixspeciality.com 		