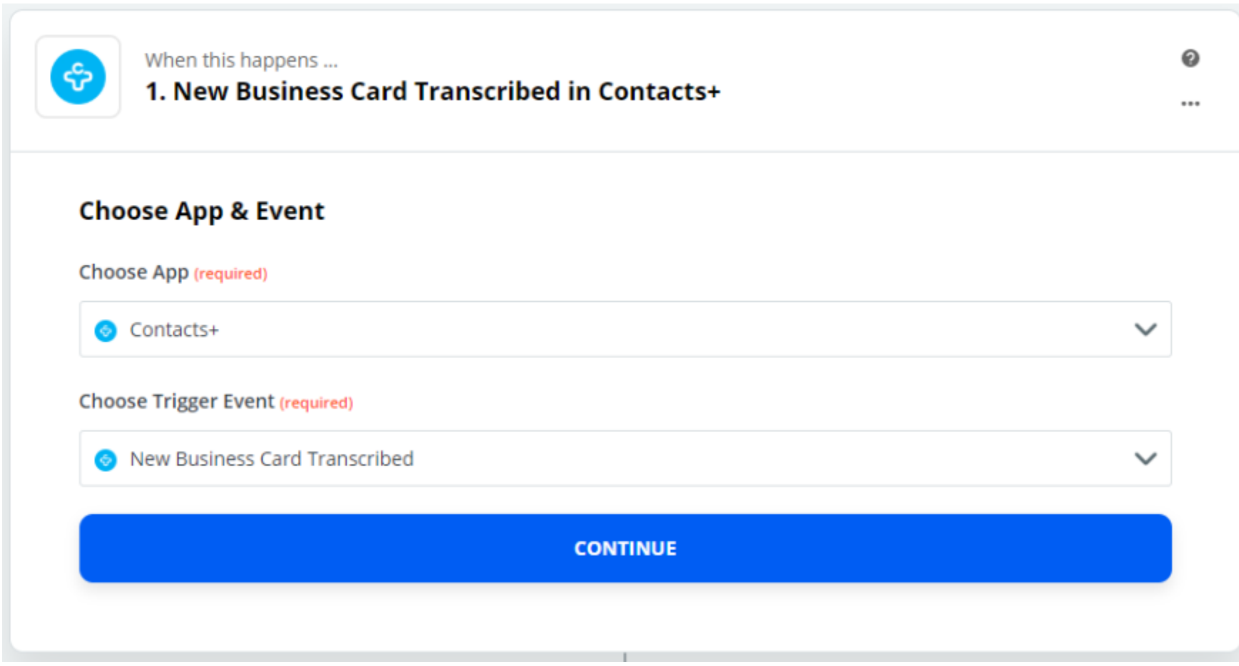
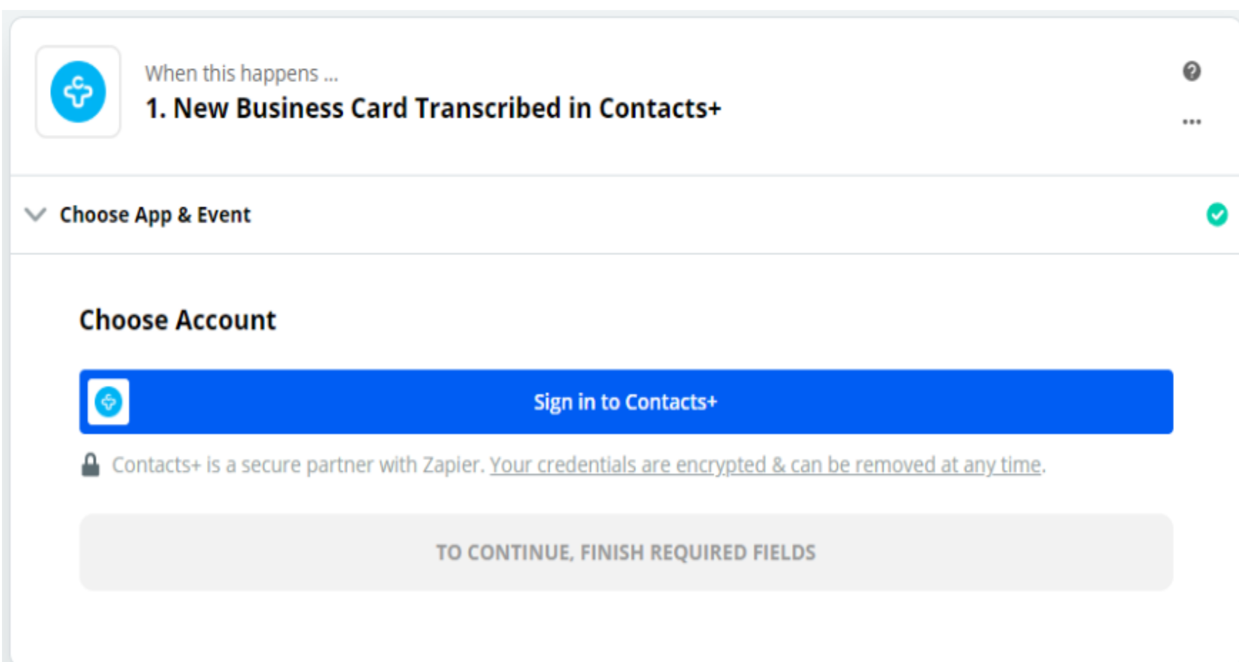
Create IRIS CRM Lead From New Business Card Transcribed In Contacts+

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+**.

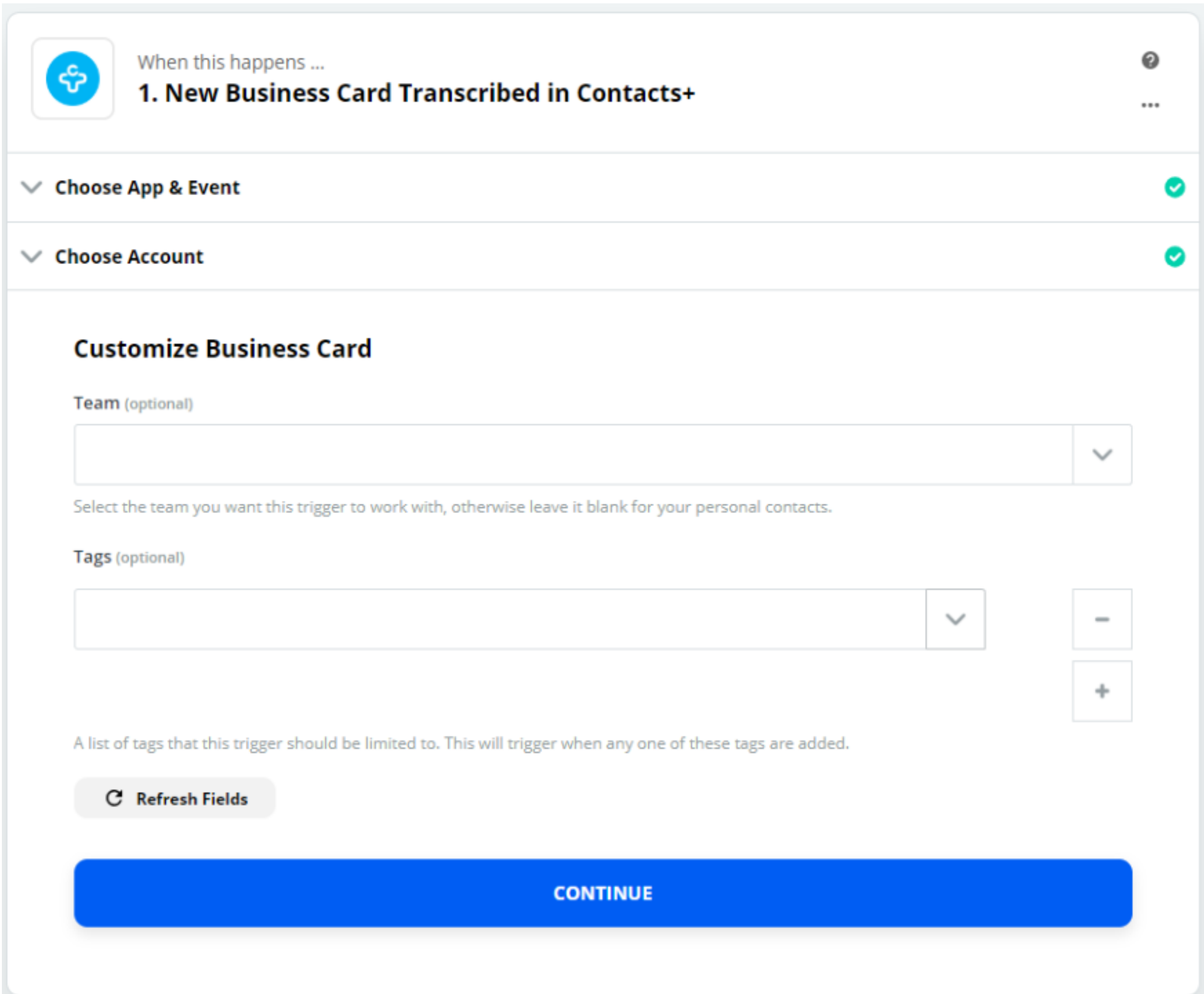
1. In Zapier, select **Contacts+** as the Trigger app and select **New Business Card Transcribed In Contacts+** as the trigger:



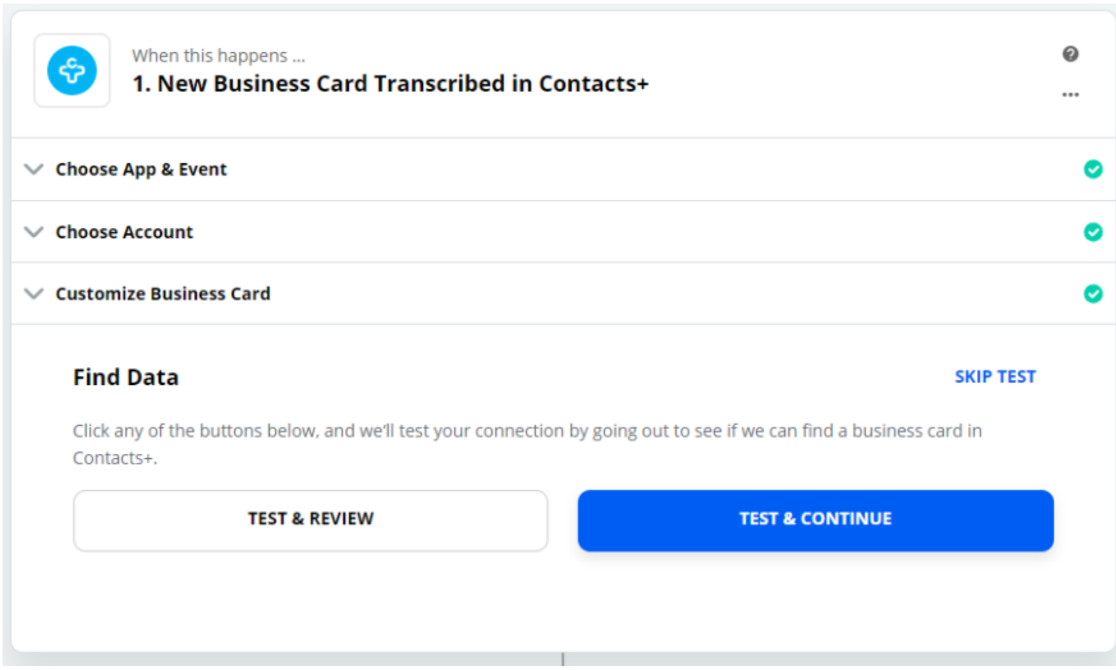
2. Sign into Contacts+:



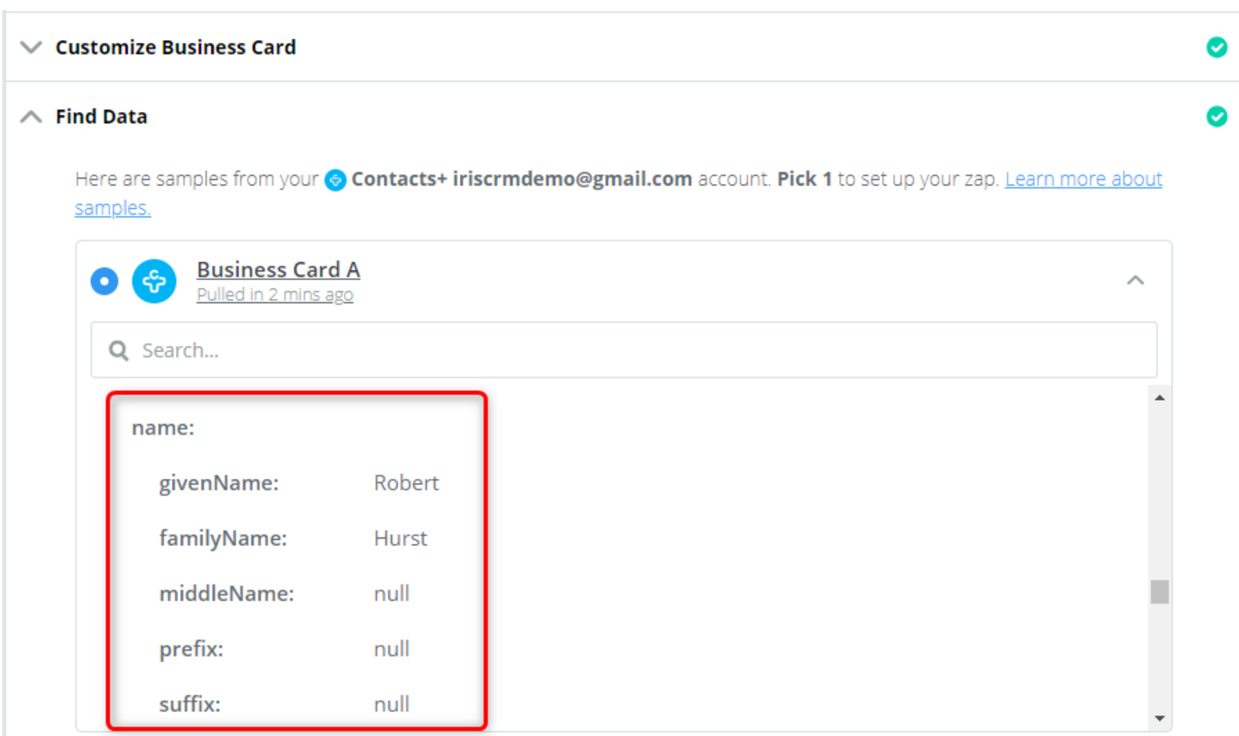
3. If you’ve set up multiple teams in **Contacts+**, you can select a Team whose contacts you wish to import into IRIS CRM (leave empty to use all Teams). You can also choose to process only the business cards with specific tags (optional):



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

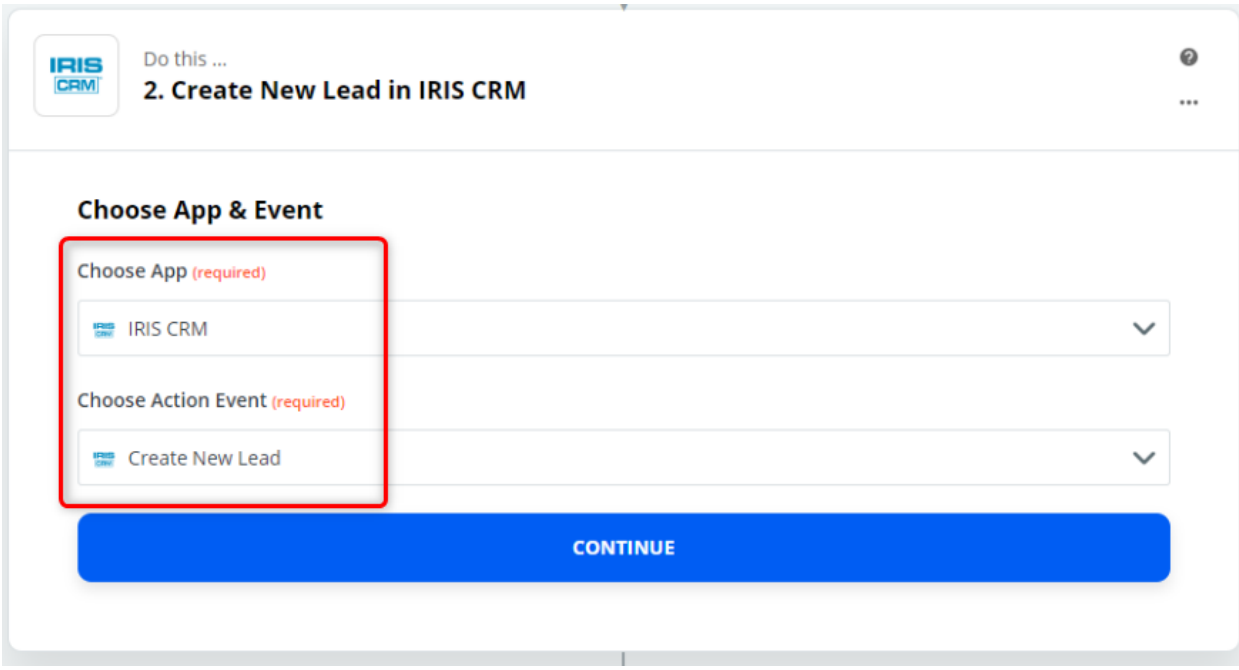


Here is an example of a sample business card and the information that is pulled in from Contacts+.

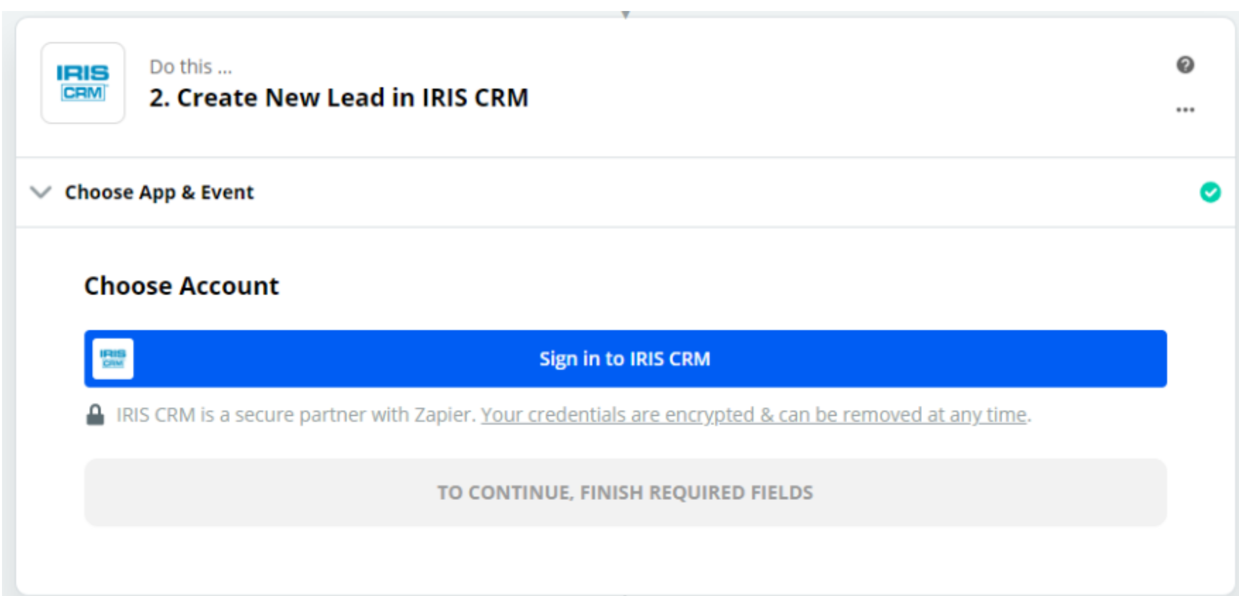


5. Having configured the trigger event, you can now select the Zapier action that will take place when the trigger is activated.

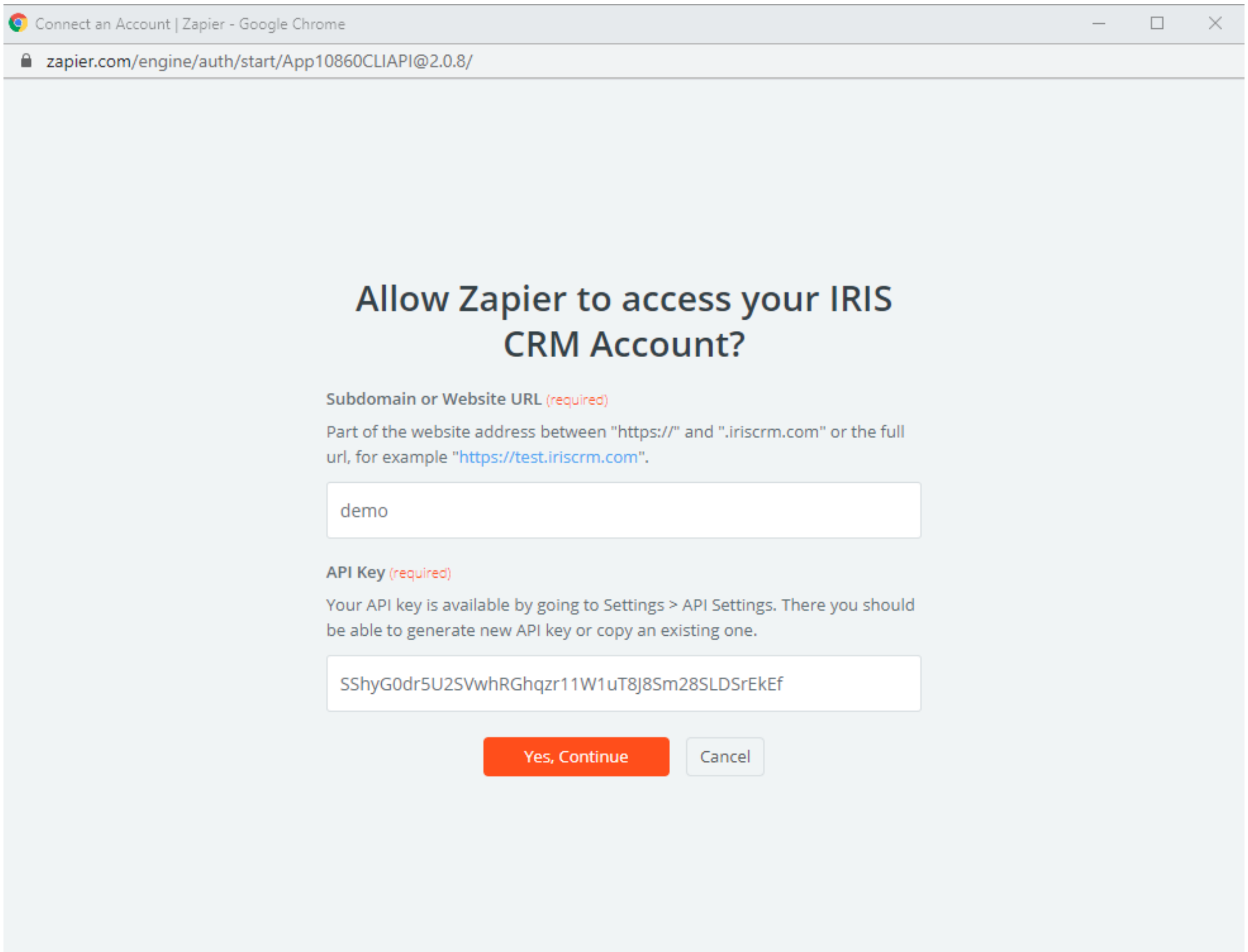
Select the **IRIS CRM** app and the **Create New Lead** action:



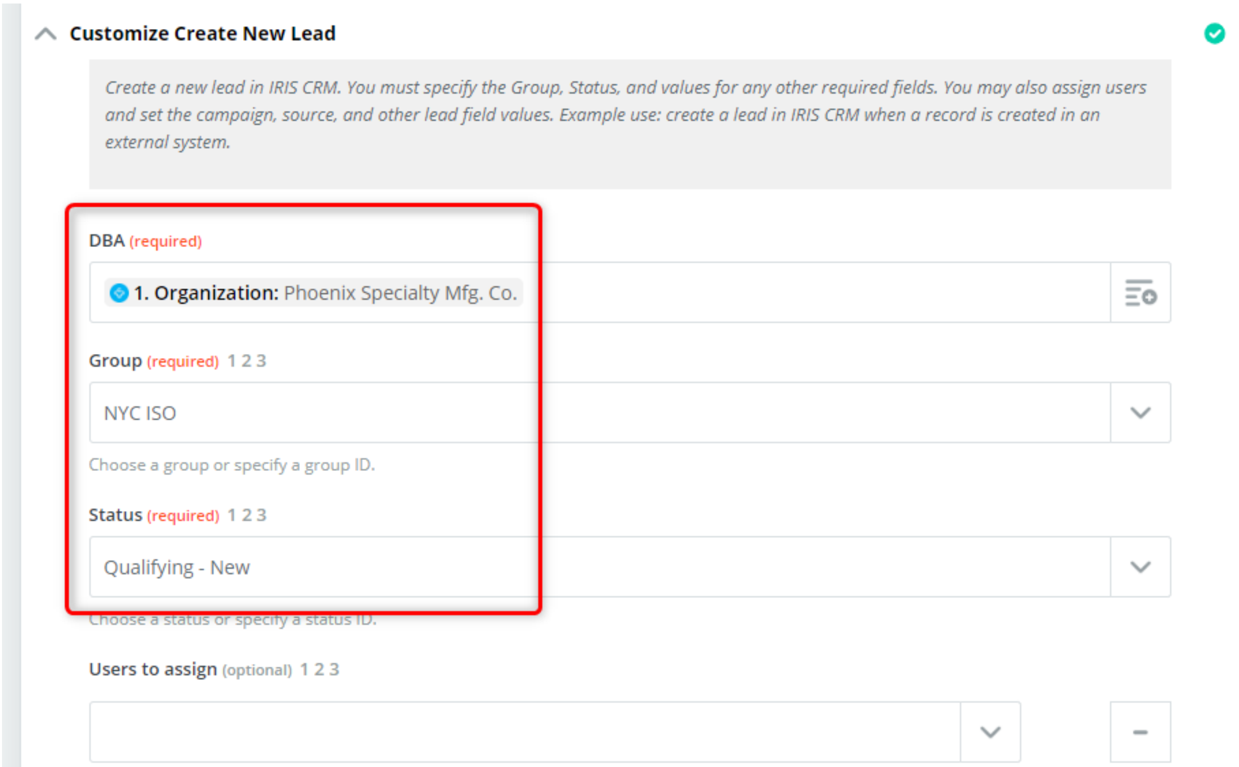
6. Next, sign in to your CRM:



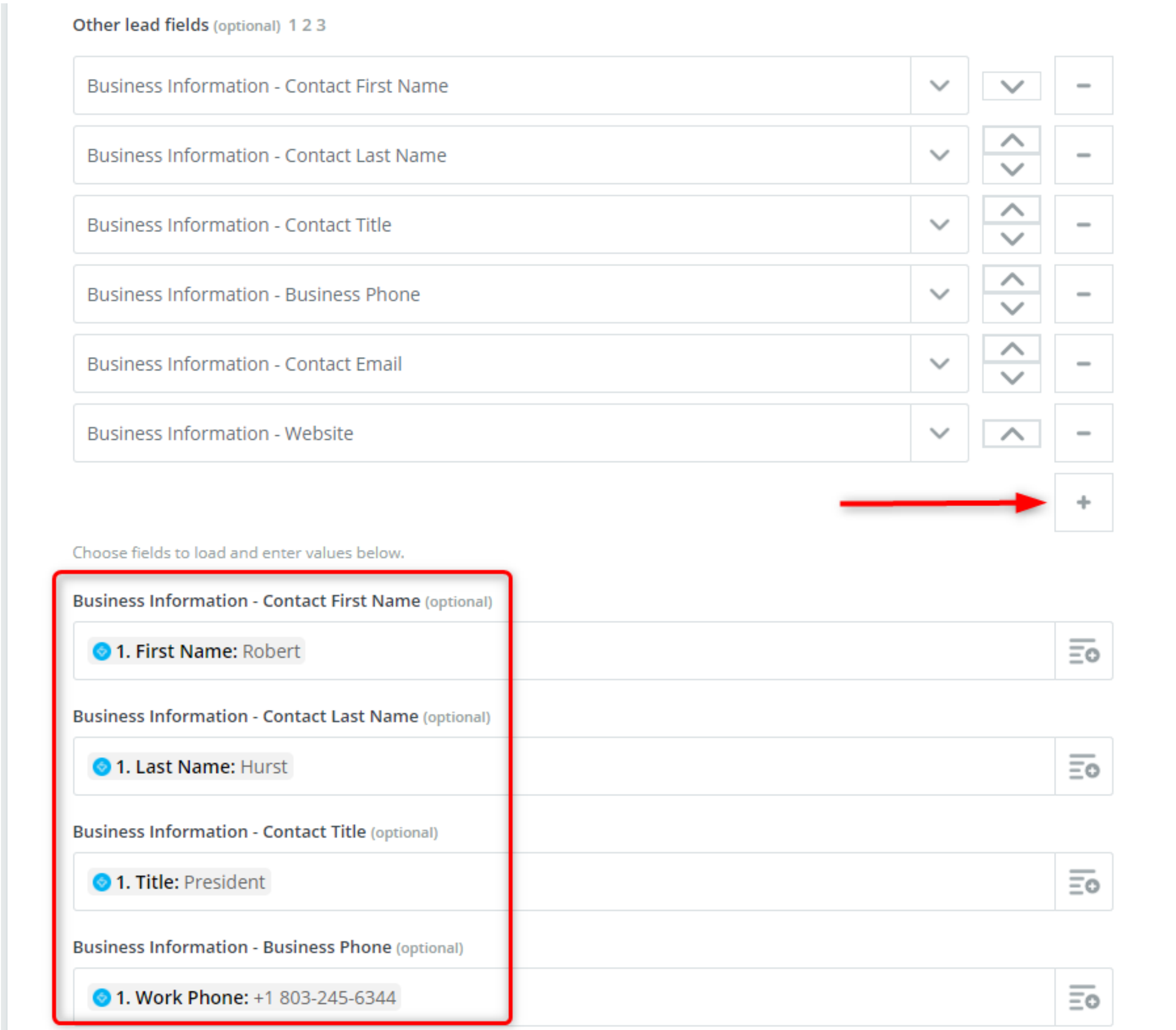
You will need to enter your domain name and the API key, which you can generate from the User Settings page. More info: https://help.iriscrm.com/hc/en-us/articles/115004979628-User-Settings-and-Notifications#API-Settings



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:

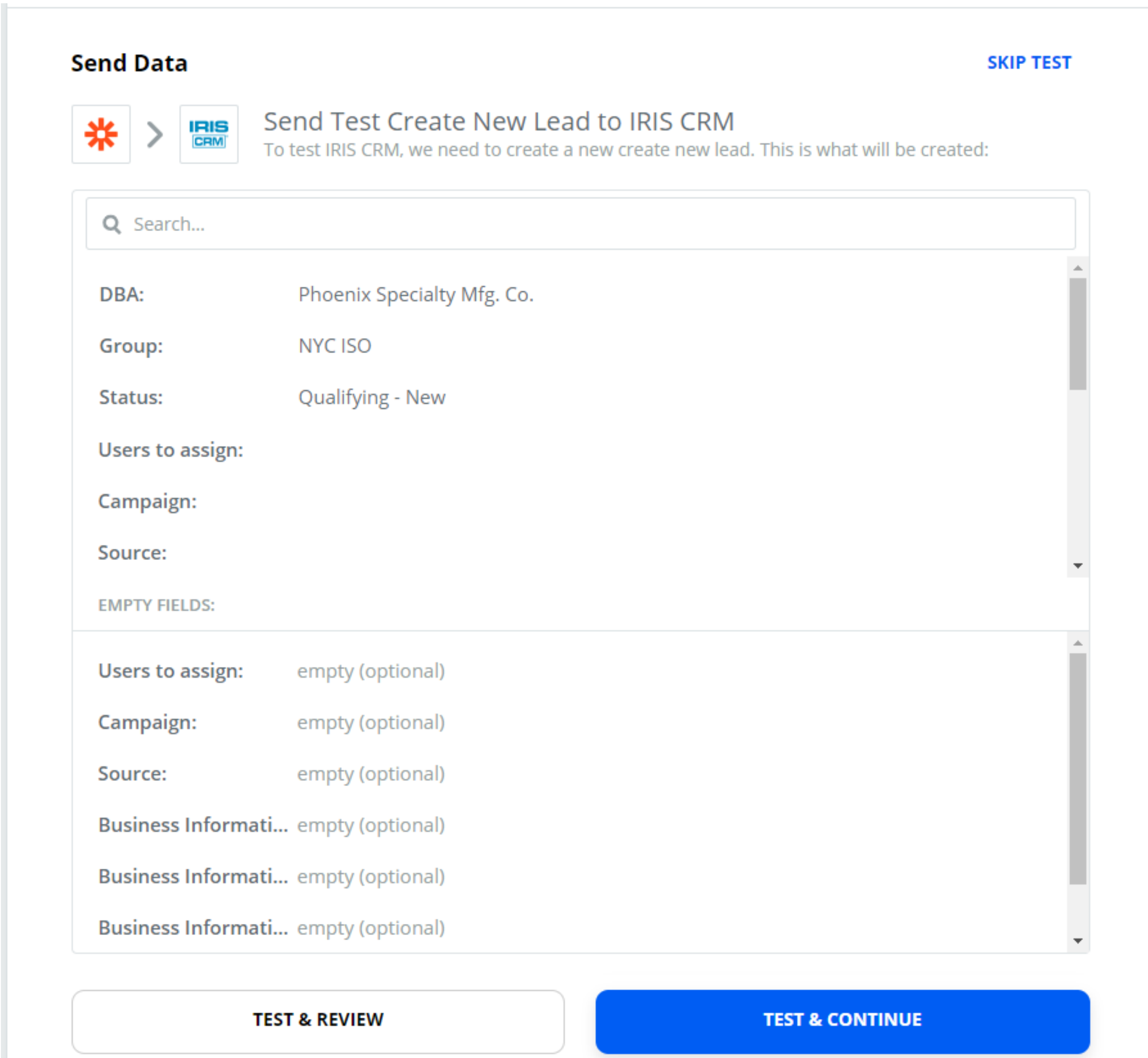


8. Next, click on the + button to add and map additional IRIS CRM fields that will be populated with the Contacts+ data. For each new IRIS CRM field, you will also need to select the corresponding Contacts+ field:

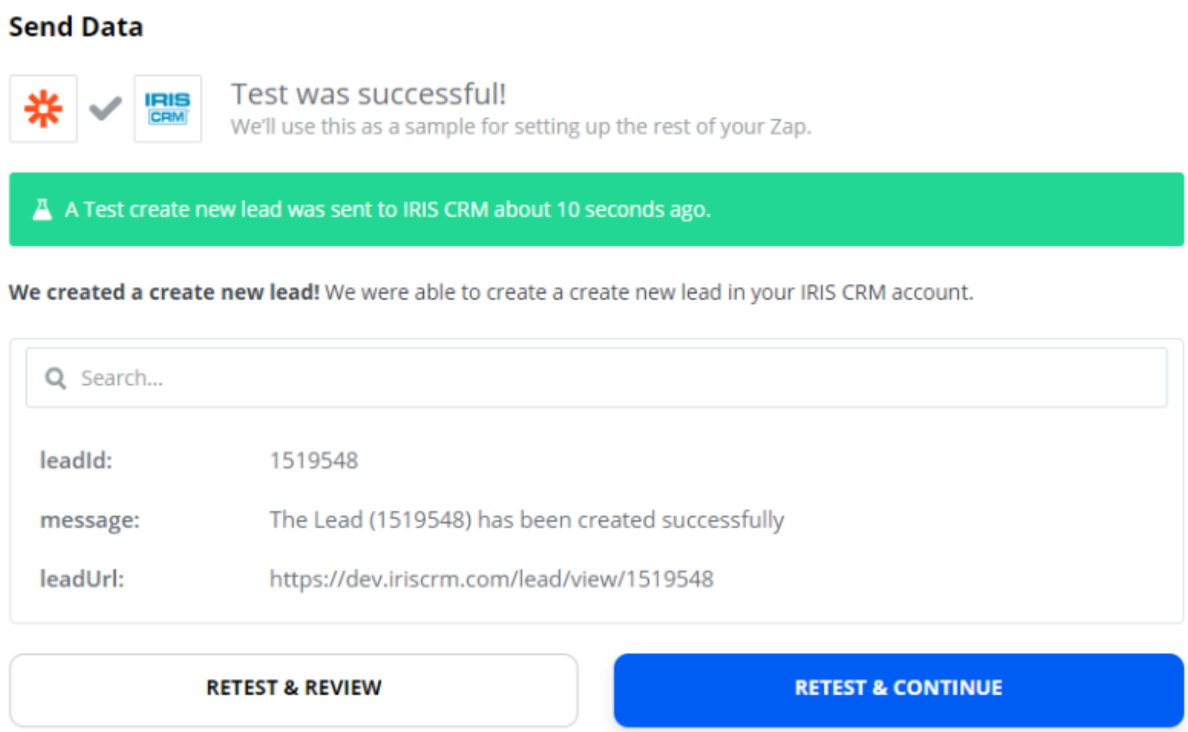


9. You can now test your flow by sending a sample business card (selected in Step 4) to IRIS CRM. Make sure that the DBA, Group, and Status fields are not empty (eg. if the sample business card does not have those fields filled in), or otherwise the lead will not be created.

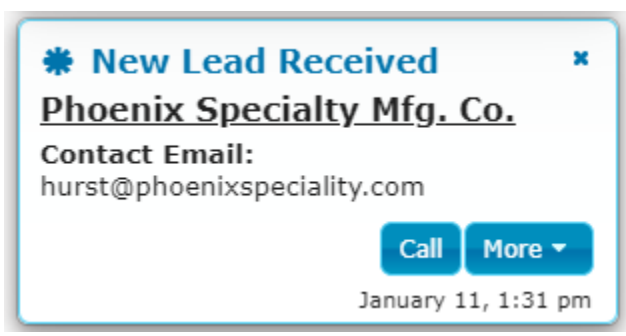
If all of the information in the sample business card is accurate, click **Test & Review**.



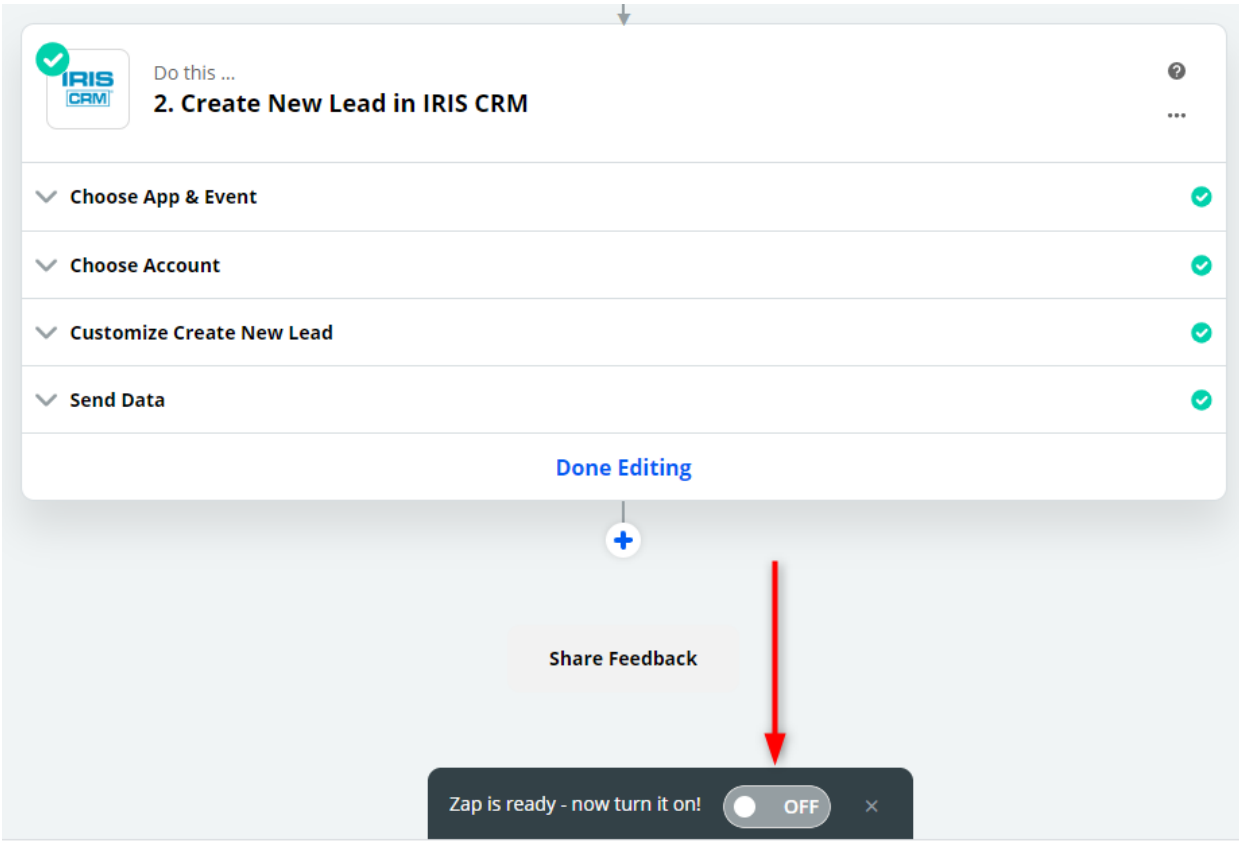
10. If the test is successful, you will see a confirmation message:



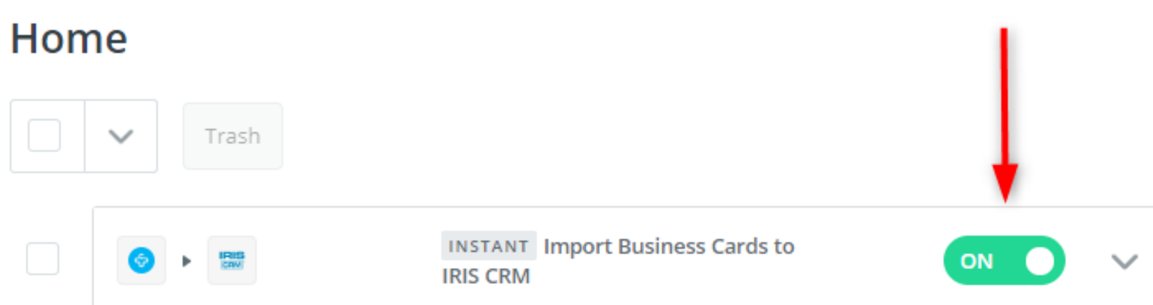
You can also open your CRM and verify that the new lead has been created, and all of the fields you mapped have been populated accurately:



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

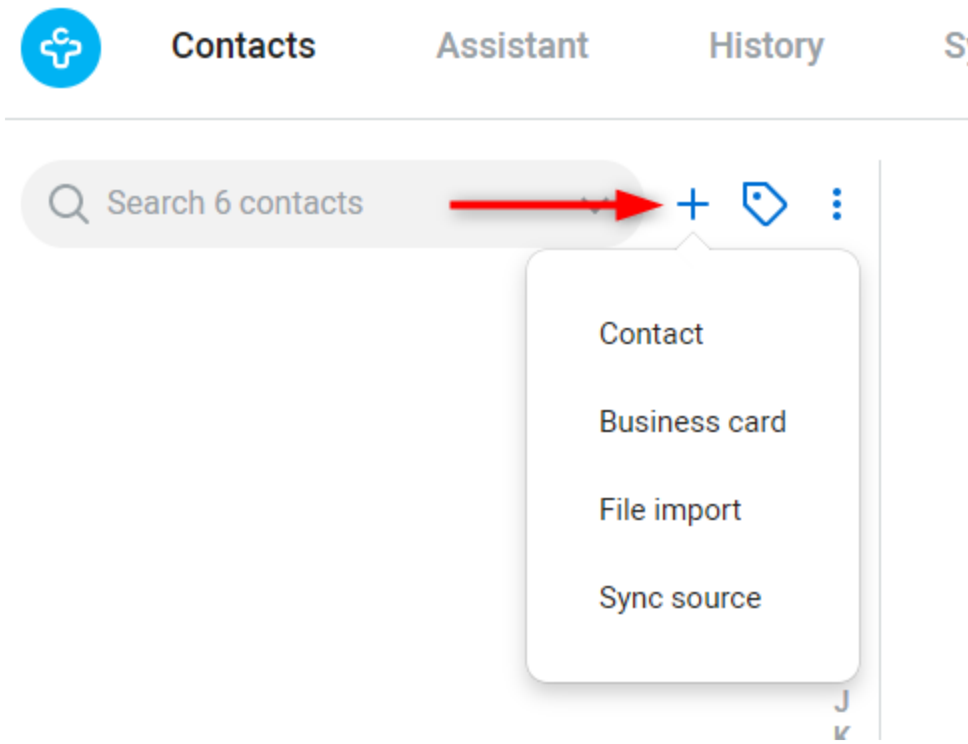


You can also enable or disable the Zap from your Home page at any time:



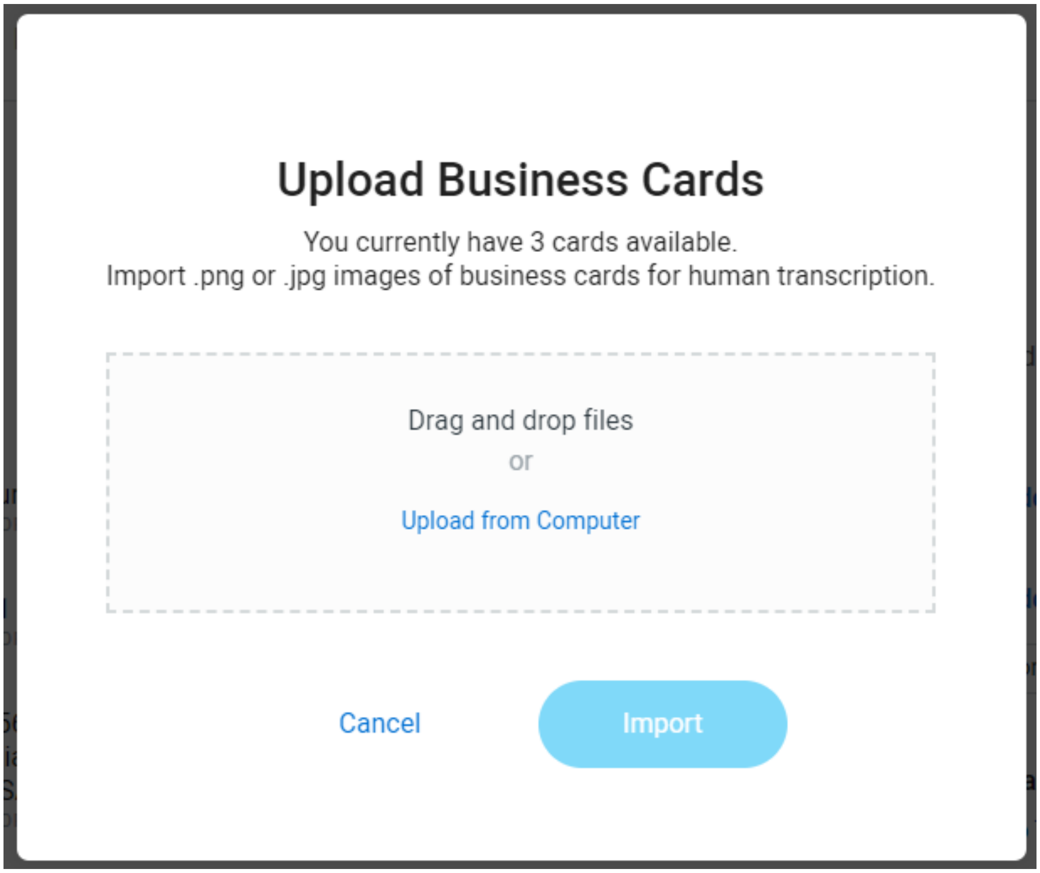
12. With the Zap enabled, you can now continue to add business cards in your Contacts+ account, after which they will be added as new leads in IRIS CRM automatically.

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



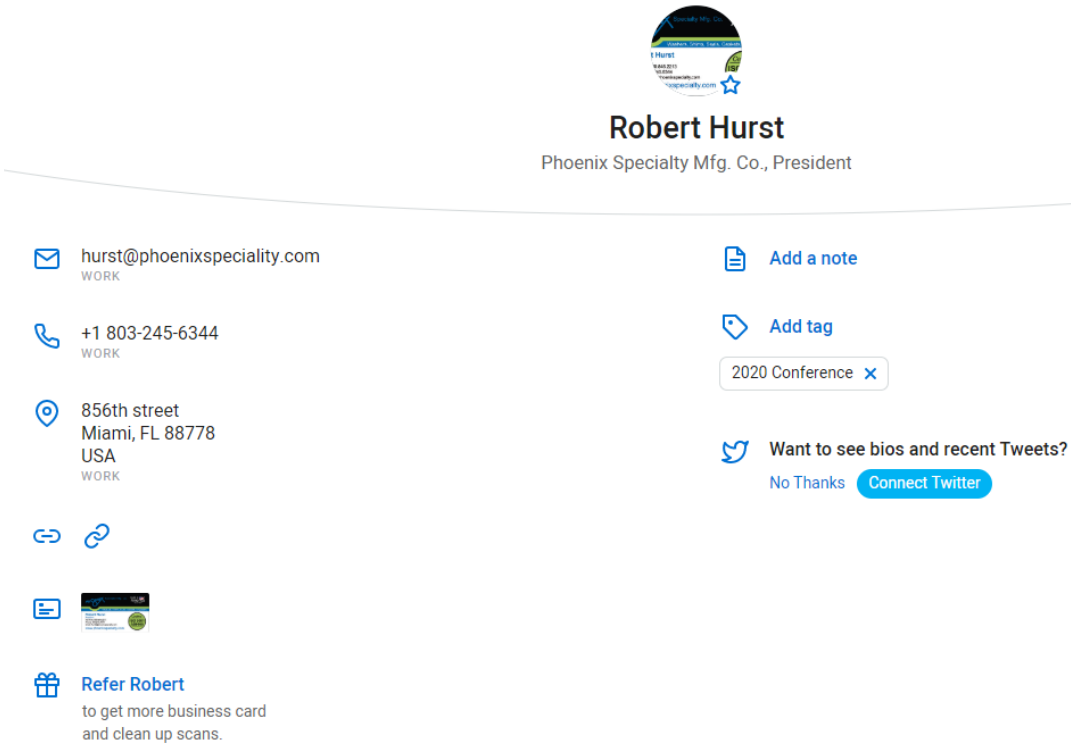
Note: You can also import business cards easily by using the Contacts+ mobile app and simply taking a picture of the business card.

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:



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