

Import contacts from CRM



Do you have contacts in the CRM that you want to import into Genesys to enrich them and add more relevant information?


In this article, we will explain how you can import your contacts from the CRM (example with HubSpot), enrich their information and find additional data.

1 Import contacts from the CRM into a list

- Go to **List > Create new > Contacts**.

Select **Import contacts from HubSpot** and choose the option that best suits your needs:

-  **Find contacts on HubSpot:** Search for contacts in HubSpot based on criteria such as seniority level, experience, company, job title, location, and intent signals.
-  **Import contacts from HubSpot List:** Import contacts from an existing list in HubSpot.

 How to use "Find contacts on HubSpot"

- Select a HubSpot field (email, company, job title, etc.).
- Choose an operator (**is equal to**, **is not equal to**, **is known**, **is unknown**).
- Enter a value and add more filters if needed.
- Review the preview and proceed with the import.
- **Add to a list** to organize your contacts efficiently.

👉 Want other custom fields? Check out our article: **How to customize CRM import**.

2 Enrich contact information from LinkedIn

If you imported the **LinkedIn URL** of the contacts:

- Select the contacts in the list.
- Go to **Enrichment > Find data from LinkedIn by URL**.

If you **did not** import the LinkedIn URL:

- Select the contacts in the list.

Go to **Enrichment > Find data from LinkedIn by name**.

3 Additional information using AI If some contact fields are not available in LinkedIn but can be found from other sources such as the company's website, Google, or Google News, you can use **AI Variables** to retrieve this information.

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To create an AI Variable:

- Place the cursor between two column headers.
- Click the "+" icon and select **Create new AI variable**.

- Enter a **prompt** to retrieve the information.
- If you want to use existing data from Genesy (name, company, email...), add them using `{variable_name}`
- Define where the information should be searched:
 - **Google**
 - **Google News**
- Or, if the information is already present in Genesy, leave the checkboxes unmarked.
- Select the **output schema**: text, number, or a predefined option.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1414060195/aab37c7a64870b04a216e75c8365/image.png?expires=1770300900&signature=2796a7e8d5a09df515fd23398e4f8e14c6ad40f3e46b458eb9362dc28254fec8&req=dS

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To execute the AI Variable:

- Select the contacts you want to enrich.
- Go to **Enrichment > Enrich with AI**.

Select the variables to be completed and click **Fill**.

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💡 Para optimizar el uso de créditos, **filtra previamente** los contacts donde la variable esté vacía.