Configure CRM

To correctly **configure the CRM** you have to enable it through the toggle switch and then click on the 'Configure' button in the CRM integration in question:

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810836206/d4544b23c02eee086b805b98299d/image.png?expires=1770723000&signature=1ece66473c706d18cfeba703d63878a479ca5a690167068107f6053066a71d29&req=dS
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A floating setup window is going to open for us, which is broken down into 4 steps:

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- **Input/sync mapping** → refers to the mapping of the CRM fields with those of Genesy. A sync is a match of the information in the CRM of a contact or a company with the information of a contact or a company in Genesy. In this sense, the mapping includes the following parameters:
- **Contact identifier**

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810841177/06a9e2507f27fd33f892b01a2a2c/image.png?expires=1770723000&signature=89c8acc715e9ec48689570d0cece615531f28c7b291d815dc74ad7052303cc78&req=dS

This mapping has three possibilities of choice:

- First name + Last name + Company name → if it is fulfilled that a contact in Genesy has those three fields the same as in the CRM, depending on the mapping of the fields (which is done in the 2nd step of the integration setup).
- LinkedIn profile URL or First name + Last name + Company name → if it is met that a contact in Genesy has either the same LinkedIn profile URL or First name and Last name and Company name the same in the CRM.
- Custom mapping → a pop-up opens where you can specify custom conditions for matching.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810899447/338da333098bc346f9fc24fe096e/image.png?expires=1770723000&signature=a6de4aba08a12a1dcc0e61d79aab96c3d4867aaff7a4996e22f0af94cbfba550&req=dSg

- **Company identifier**

In the same way, this mapping also has three possibilities to choose from:

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- Domain → company domain, for example genesy.ai. There is also a checkbox to include any domain extension as company identifier, for example .ai, .com, .es, .org....
- Domain or company name → domain or company name.
- Custom mapping → a pop-up opens where you can specify custom conditions for matching.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810873976/f9b975a11c1d5068d5f1e946685d/image.png?expires=1770723000&signature=b973e8c44033d00a11d38ffea9b9b1a8b4d104476b1adb75da4e6f4ec21e97dd&req=dS

- **Export mapping** → in this 2nd step of the setup you configure all the Genesy field associations with CRM fields, in order to export all the data you want to export. It is divided into two tabs, one for Contacts fields and one for Companies fields. The type of mapping configuration in both tabs is the same.

Here we have three types of fields for mapping:

- **Genesy fields** → these are the fields there are from the contact lists. Using the '+' icon we can add another mapping, first we will have to select which Genesy field we want to map, and then select which CRM field to associate. To the right of each association there is a checkbox to determine if at the time of exporting an Overwrite of what was previously in that field in the CRM should be done.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810874493/9edfbb4f6c931ff4aa029cd4e8e1/image.png?expires=1770723000&signature=298e8eba3e98e9c5c66df2ea4a0e8f8fbb76e992c963c44dfe492631aae9e695&req=d

- **Fixed fields** → are the fixed fields that are always exported with the same value. Here there are many possibilities depending on how each company works. But to give an example, something typical is to create a field in the CRM called Source and map that field in the Fixed field, indicating as Value to export 'Genesy'.
- **Export fields** → are the fields whose value we want to configure at the time of export.
- **Engagement Field** → are the fields that are configured when an Activity is created in the CRM.
- **Association Type** → is the configuration of the character of the association. It can be an additional association, Primary, or Primary deleting previous associations.

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![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810876912/5ab7444faa4566f14eb78d11a8f4/image.png?expires=1770723000&signature=664c75507a24d86353cca9b524730d6b19a00dc82ba06fe5a47dea6c1d33b579&req=c

Important to note that the association between a Contact and its Company is automatically generated if it is selected when making an export of a contact, by activating the switch to 'Export x associated companies'.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810895495/5d5e160a79b660140cb8185bfedd/image.png?expires=1770723000&signature=4c014c70ddef35abba10159f4417407066ed8446d2c8fed095f5dd29cfc0bc67&req=dS

It is also important to understand that it is not possible to map a Company field in the Contacts tab, nor vice versa, as it may cause an error and not export correctly.

- **Campaign mapping** → in this 3rd step you configure the mappings of the campaigns optionally. They are not list fields, but they are properties of the campaigns:
- **Campaign Sequence Details** → sequence details, i.e. the steps included in the campaign. Ex: '1st Email, 2nd Email, Linkedin Connection Request, 1st Linkedin'.
- **Campaign Engagement Status** → campaign status of each lead. Ex: 'Added to Campaign', 'Message Sent (1/3) - Email', 'Message Replied (3/3) - Linkedin'...
- **Campaign Opens** → total number of times a lead has opened one or more emails of a campaign.
- **Campaign Clicks** → total number of clicks a lead has made on email links of a campaign.
- **Campaign Open Analysis** → indicates if a contact has not opened any mailings, or if yes, indicates yes or no for each mailing sent. Ex: 'No', 'Yes (1st Message)', 'Yes (2nd Message).
- **Campaign Click Analysis** → indicates if a contact has not opened any link in any mail, or if yes, indicates yes or no for each sent mail containing a link. Ex: 'No', 'Yes (1st Message)', 'Yes (2nd Message).
- **Campaign Reply Analysis** → indicates whether or not a lead has replied to each automated message in a campaign. Ex: 'No', 'Yes (1st Message)', 'Yes (2nd Message).
- **Sequence status** → indicates one of the possible campaign statuses: 'Not Started', 'Ongoing', 'Replied' and 'Finished'.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1810892497/2d13eadb45138326f37d4629cfcb/image.png?expires=1770723000&signature=234ee30834192e559f1335c610a7c3905c2a890eb9d2d4c1c2a5e1f635261f73&req=dS

- **User mapping** → in this 4th and last step of the CRM integration configuration the associations between Genesy identities and CRM users, or between Genesy users and CRM users are defined.
- **Identities mapping** → It means that a campaign, which is always linked to an identity, will use the associated CRM user when executing the sync. In other words, in the CRM activity log, that user will be the one who will have executed the sync action (through Genesy of course).
- **Users mapping** → It means that any Genesy user can be associated to a CRM user so that the exports go to that user in the CRM. That influences that if in the CRM users have different permissions this association will limit depending on that.

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