Sync a property from your CRM for a contact or company

To sync information (or a property) from your CRM to a specific lead or company in Genesy, follow these steps:

1. Check Your CRM Connection

Ensure your CRM (e.g., HubSpot, Salesforce, Pipedrive) is connected to Genesy by going to the **Integrations** page and verifying the connection.

2. Go to Leads or Companies Page

Depending on whether you want to sync a lead or company property, navigate to the **Leads** or **Companies** view.

3. Add a New Field for the CRM Property

- In the list view, click on **Add New Field**.
- Select **New CRM Field** from the options.
- Enter the internal name of the CRM property you wish to sync with Genesy. This is not the name that you see in your CRM as label, but the name that never changes.

4. Re-Launch CRM Sync

After adding the new field, relaunch the CRM sync for the specific list of leads or companies. Genesy will now pull in the data from your CRM for the specified property.

5. Review Synced Information

For those leads or companies that exist in your CRM, you will now see the information synced.

Rather watch a video?