Understand Activity History

The Activity section gives you a detailed record of everything that has been done in Genesy: who did what, when, and with what result.

You can use it to:

- Track the progress of bulk operations (CSV imports, CRM exports, scrapings, etc.).
- Quickly see if a task completed, is still running, or failed.
- Drill down into reports (CSV Import / CRM Export) to understand what happened.
- Monitor team activity and usage of your daily scraping quota.

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1. What you see in Activity History

Every row in **Activity** represents a task or process executed in your Genesy workspace. For each entry you can typically see:

- **Action type** – for example:
- Import companies from CSV
- Import contacts from CSV
- Export companies to CRM
- Export contacts to CRM
- Scraping jobs and other background processes
- **User** – who triggered the action.
- **Number of records** – how many companies/contacts were processed.
- **Status** – whether the action is Completed, Failed, Processing, Queued or Cancelled.
- **Time** – when the action started and/or how long ago it was executed.
- **Shortcuts to reports** – for relevant actions, icons to open the CSV Import Report or CRM Export Report, or to expand the list of affected records.

This makes Activity the "single source of truth" to understand what has happened in your account.

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2. Open Activity History

- Log in to Genesy.
- Go to the **Activity** section from the main navigation.

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You will see a chronological list of actions, with the most recent ones at the top.

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3. Filters: focus on what matters

At the top of the Activity view, you can narrow down the list using filters. This is essential when you have a lot of history.

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3.1. Filter by action type

Use the **All actions** dropdown to show only the type of process you care about. For example:

- **Import companies from CSV** – to see only company imports.
- **Import contacts from CSV** – to see only contact imports.

- **Export companies to CRM** – to see company exports to your CRM.
- **Export contacts to CRM** – to see contact exports to your CRM.

This is the fastest way to answer questions like:

- “Did yesterday’s contact import finish correctly?”
- “How many exports to the CRM have we done this week?”

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878648468/fba8e26ff21368f71cada58625b4/image.png?expires=1770734700&signature=0f5b90b9ab634356ac3103029eaeb5a0356a5593b48d24df3b81c01897d13a97&req=d

3.2. Filter by user

Use the **All users** filter to:

- See actions performed by a specific team member.
- Review what a new colleague has done during onboarding.
- Investigate who launched a particular import/export.

This is useful for audits and team monitoring.

3.3. Filter by date range

Use the **Date** filter to focus on a specific time window, for example:

- **Today** or **Yesterday** – to verify fresh operations.
- **Last week** or **Last month** – for periodic reviews.
- A **custom range** – to analyze a concrete period (e.g. for a campaign).

Combine action type + user + date to get a very precise view (for example: “All CSV imports done by Maria in the last 7 days”).

3.4. Filter or scan by status

Each action has a **status**. You can use status filters (or visually scan the list) to focus on:

- Only **Failed** tasks to troubleshoot what went wrong.
- **Processing** or **Queued** tasks to see what is still running.
- **Completed** tasks to confirm everything is finished.

More details on statuses below.

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4. Understand task statuses

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Statuses tell you exactly where each process stands:

- **Completed**

The action finished successfully and all applicable data was processed.

- **Processing**

The action is still running. Data is being processed; you may need to wait until it finishes before exporting or triggering related tasks.

- **Queued**

The action is waiting to start. This can happen when other processes are already running, or when usage limits are temporarily reached.

- **Failed**

The action could not be completed due to an error.

- For imports/exports, open the corresponding report (CSV Import Report or CRM Export Report) to see details of what went wrong.

- Typical reasons include invalid data, missing required fields or conflicts in the CRM.
- **Cancelled**

The action was manually cancelled or stopped. No further processing will occur.

Use these statuses to quickly identify where you need to take action (for example: re-run a failed import after fixing the file, or free up resources if too many jobs are queued).

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5. Daily scrapings usage

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878638094/634821dca8144a2c0713da7cd108/image.png?expires=1770734700&signature=f88ed4869c9181db42aec1c111ea6ad15124c3ff6e6037261f3e5a4823c96309&req=dSg

At the top-right of the Activity page, you will see the **Daily scrapings usage** indicator.

This panel shows:

- How many scraping processes have been executed today.
- How this compares to your allowed **daily limit**.

You can use it to:

- Avoid exceeding your daily quota.
- Plan scraping-heavy activities (for example, spread them across days).
- Understand when high usage peaks happen in your team.

If you frequently reach your daily limit, consider:

- Reviewing which recurring jobs can be optimized or reduced.
- Coordinating scraping schedules within the team.
- Contacting Genesy if you need to discuss plan limits.

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6. CSV Import Report and CRM Export Report from Activity

From Activity, you can go deeper into two key reports:

- **CSV Import Report** – to inspect the result of importing companies or contacts from CSV.
- **CRM Export Report** – to inspect the result of exporting companies or contacts to your CRM.

These reports are essential to understand not just whether an action succeeded, but *what exactly* was created, updated, or blocked by errors.

6.1. Access the CSV Import Report from Activity

- In **Activity**, filter **All actions** by:
- **Import companies from CSV** or
- **Import contacts from CSV**.
- Optionally filter by **user** and **date** to find the exact import.
- For the import you want to inspect:
- Click the **sheet icon** to open the **CSV Import Report**.
- Click the **dropdown arrow** to expand and see the list of imported companies or contacts.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878650964/bb9d3b256c1b029b036c1764795f/image.png?expires=1770734700&signature=6fb8d252b71ea7cc404697495fbe58a874a730df6006aba8f95252d5732eba5a&req=d

In the CSV Import Report you can typically see:

- Total records processed.
- How many were imported successfully.
- Whether there were **errors or warnings** (for example: invalid fields, missing required data, duplicates).
- When available, details about the rows that failed.

This helps you decide whether you can trust the import as-is or need to fix the CSV and re-import.

For a step-by-step guide focused only on imports, see:

Check CSV Import Report

6.2. Access the CRM Export Report from Activity

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878650260/6f5107429eced5d3c6649cac695b/image.png?expires=1770734700&signature=aa42aa80921dfaaaeb4529792fa97ea15ead3ecc440604acd73b97fe8ddb4843&req=dS

- In **Activity**, filter **All actions** by:
- **Export companies to CRM** or
- **Export contacts to CRM**.
- Optionally filter by **user** and **date**.
- For the export you want to inspect:
- Click the **sheet icon** to open the **CRM Export Report**.
- Click the **dropdown arrow** to view detailed information for companies or contacts.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878652572/54d9180363059d2d320a76311379/image.png?expires=1770734700&signature=106f6607ede0dbca64721e21cb2f69ac0b4427e1716e6f174cd5a1c322ca46cd&req=dSg

In the CRM Export Report you will see categories such as:

- ✅ **Created new contacts** – number of new records created in the CRM.
- ✅ **Updated contacts that already existed in CRM** – how many records were updated.
- ⚠️ **Found duplicate contacts** – records that were not exported due to duplication.
- ⚠️ **Weren't able to associate company to contacts** – contacts without a matched company.
- ⚠️ **Companies that have the same CRM ID** – potential ID conflicts.
- ❌ **Found companies with create conflicts** – companies that could not be created (for example, due to duplicated or invalid data).

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878653439/b41864e717c0e9bc36345cf75cff/image.png?expires=1770734700&signature=c7abd7415eb9dc89fc8d5b3b4c6a846eb4668e145bb9d20c149dfbaf13582af2&req=dS

You can hover over the icons next to each category to:

- **Open the table** – see the underlying list of records.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878656680/3f4bb635c7003003d4cda6698bf3/image.png?expires=1770734700&signature=a272e6bdbc2e9734ab4e0f8ef465788e36d4fb5d4507f4dbb9f1bf80b116457b&req=dS

- **Open the CRM** – jump directly to the relevant records in your CRM.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1878657539/2ba43cfdfc69df2eb1b321fee2c2/Captura-2Bde-2Bpantalla-2B2024-11-25-2Ba-2Blas-2B10*21*39.png?expires=1770734700&signature=987e7e3945592f21f7caee28786fe9e82a9ee45aa4e6e6a38f3d0cd6e6ccf9f6&req=dS

For detailed troubleshooting of CRM export errors, see: **Check CRM Export Report – Errors**.

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7. Practical use cases for Activity 🏆

Here are common ways teams use the Activity History effectively:

- 👀 **Monitor teamwork**
- See which imports/exports are being run by each user.
- Review the work of new team members.
- 🔄 **Track automated or long-running processes**
- Check whether scraping jobs or large imports are still **Processing**, **Queued**, or **Completed**.
- Avoid launching conflicting processes while another large job is running.
- 🚨 **Detect and fix errors**

- Filter by **Failed** to quickly find problematic tasks.
- Open the corresponding report (CSV or CRM) to see why they failed and how many records were affected.
- Correct the issue (e.g., fix the CSV or CRM mapping) and re-run the task.
- 📋 **Audit and compliance**
- Answer questions like “Who exported this data?” or “When was this list imported?”.
- Keep track of data operations for internal or external audits.
- ⚡ **Resource optimization**
- Use **Daily scrapings usage** to keep scraping under control and avoid hitting limits unexpectedly.
- Schedule heavy jobs for less busy moments.