How to Customize CRM Import

Do you want to see in Genesy additional properties from your CRM?

Check out how to do it:

1️⃣ Go to Contacts/Companies page

2️⃣ Add new CRM field

Place the mouse in between two column headers > click "+" > **New CRM field**

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1403809557/a9e7444ef7ead7946c6d6a9064b0/image.png?expires=1770723000&signature=1215001f3241d8f9013c65252e3c46f03a01949ea53052482cd82f8e039ca089&req=dS

3️⃣ Choose configuration

Fill in configuration options in the pop-up:

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1940211456/1abafe5897e7744bb5dc9cc5deea/image.png?expires=1770723000&signature=0eab19dfbc8f61c28846905de1b4eb1543db602774b4ec68658ddc8f29bb03ba&req=d

- **Entity** (only for Leads and only for Salesforce integration): object to check in Salesforce, can be contacts, leads or both
- **Name:** name for the field in Genesy
- **CRM Mapping:** property name from your CRM
- If you wish to move CRM values to an additional Genesy field, **set toggle "Map to field" as on** and introduce the name of the field where you wish to copy the values

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1403815022/65e8d87ed22d499afcac2faec5df/image.png?expires=1770723000&signature=c08d03545b3849d3ab342806fde07ee104b8fd1d87c56465b778b93b3ad152ee&req=c

4️⃣ Launch CRM Sync

Once you have created and mapped all the fields you need, launch again CRM sync to see the values:

- Select leads > **Enrichment**

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1940236806/f39c3ac134f623b4c438b95a5b69/image.png?expires=1770723000&signature=93132fe27204838e7a0a985f838e4cf61d6e85d66cb627a0d5fe3833a6ac8cf3&req=dS

- Choose CRM sync > Update sync

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1940223094/05aa7eb0356467fc2e1ffe657c10/image.png?expires=1770723000&signature=1bfee7b9a1a85de00acdb92f44c032c2f4c7905a67826b1817dce2186227e39c&req=dS

⚠️ When performing the synchronization, select **"Full sync"** if you want to reset contact data un Genesy and re-sync from scratch. Once it's finished, you will see values popping up in the corresponding CRM fields.