

Import a csv file with companies

Do you have a list of companies that you wish to import in Genesy? In this article, we'll explain how you can import it into the platform and search for leads.

First, make sure that the list:

- Contains company names in one column (at a minimum).
- Is saved in .csv format.

Then, follow these steps:

1 Import the .csv file

- Go to **Companies > Add Companies > Import from csv**.
- Select the file on your computer.
- Give a name to the list you're going to create.
- Map the fields from your file to the fields in Genesy. If there are fields you don't want to upload, simply ignore them.
- **The only required field is the company name.**

Do you have a list without names but with domains? 

Copy and paste the domain in another column and upload one column as company name, and another as domain!

2 Retrieve information from LinkedIn

Once the company file is uploaded, we will locate them on LinkedIn. The process differs depending on whether you have the LinkedIn URL in the **Company LinkedIn URL** field or not.

- **If you have the Company LinkedIn URL:**

Select the companies from the list > **Enrich > Find data from LinkedIn by URL**

- **If you don't have the Company LinkedIn URL**

Select the companies from the list > **Enrich** > **Find data from LinkedIn by name**

Apply filters:

- Match only if the company name is similar (we recommend ALWAYS enabling this).
- Match only if the domain is exact → si esta casilla se marca, el sistema buscará por dominio si no encuentra el nombre
- Headquarters Location.
- Industry: Be mindful that the industry listed for a company on LinkedIn might not always match your expectations.
- Company headcount.

Haven't found the company, or have you found a company with the same name but not the one you are looking for?

Check what other companies are on LinkedIn with that name by clicking on the magnifying glass  next to the company name.

You can choose the result you prefer, or select several or all of them to import.

Here's how:

3 Find leads within these companies

- Select companies from the list > **Enrichment> Add contacts to company**.
- Choose the maximum number of leads you want to import per company.
- Apply filters to identify the individuals of interest within these companies.
- Select an existing list or create a new one.

- **If you create a new list**, we recommend including the filters for both people and companies in the name (e.g., *CEOs and Sales Decision Makers / B2B SaaS / <50 employees / Spain*.

4 Clean up the leads from the list

- Select the leads > **Enrich** > **Enrich with AI**.
- Choose the AI variable created to filter whether the lead is a target or not (e.g., *Job Title Review*) to determine if the lead is "good" or "bad."
- Filter to select the leads marked as "bad" > **Delete**.

5 Enrich the leads with contact details

- Select the leads > **Enrich**.
- Choose the type of enrichment:
- **Phone and email enrich:** Retrieves both phone numbers and email addresses.
- **Email enrich:** Retrieves only email addresses.

 **Reminder:** When importing companies from a **CSV**, remember to **Find Data from LinkedIn by URL / Name**.