

Import companies from Salesforce

Do you have companies in Salesforce that you wish to import in Genesy to enrich and add leads?

In this article, we'll explain how you can import it into the platform, enrich them, and search for leads.

Follow these steps:

1 Import the companies to a list

Go to **Companies > + add new companies > Find companies in Sales Force**

- 1) Apply filters according to the desired criteria. 2) Click on 'Fetch Preview' to preview the records.
- 3) **Add to list** 4) Add it as a new list or add the companies to an existing list.

- The following properties from Salesforce will appear in Genesy as the following fields:

Field name in Genesy

| Property name in Salesforce

| name
| name
| Website
| website
| Domain
| domain
| Street Address
| address
| City
| city
| Country
| country
| Description
| description
| Year founded
| founded_year
| industry
| industry
|

Want to retrieve more fields than the above mentioned?

Check out our article  [How to customize CRM Import](#)

#

2 Retrieve additional information about the companies from LinkedIn

- If you imported the Company's LinkedIn URL

select companies from the list > **Enrichment > Find data from LinkedIn by URL**

- If you didn't import the Company's LinkedIn URL

select companies from the list > **Enrichment > Find data from LinkedIn by Name**

3 Retrieve additional information using AI

Are there any fields for your companies that are not present in LinkedIn but can be easily found in the company's website / Google / Google News. A) **Create an AI Variable** to retrieve this information following these steps:

- Go in between two column headers > Click on "+" icon > **Create new AI variable**
- Introduce a prompt. If you wish to call variables in Genesy (company name, description...), add them by typing `{"+ variable name`}
- Indicate if it should look for the information in the company website, Google or Google news. If all the information is already present in Genesy and there is no need to look elsewhere, just leave the boxes unchecked
- Select the desired output: text, number, date or one of (picklist)

B) **Run AI Variable** following these steps:

- Select companies you want to enrich with AI fields > **Enrichment > Enrich with AI**

- Select variables you wish to fill in > **Fill**
-

For credit optimization, we recommend you only enrich those companies where that variable is empty by filtering beforehand.

4 Search for leads within these companies

- Select companies from the list > **Enrichment > Add contacts to company**
- Add filters to identify the people you're interested in within those companies.
- Create a list of leads by including the person and company filters in the name (e.g., **Sales > 3 to 5 years > Spain**)

 **Reminder:** When importing companies from **Salesforce**, remember to **Find Data from LinkedIn by URL / Name**. 
[Check the guide here.](#)