Integrations

The **Integrations** section allows you to connect your existing tech stack to Genesy. This area is organized into three tabs: **All**, **Enabled**, and **Disabled**, giving you a clear view of your active and available connections .

Available Integrations

In the **All** tab, integrations are categorized by their function:

💼 CRM

Connect your CRM to synchronize and export contacts and companies.

- **Supported Platforms:** HubSpot, Dynamics, Pipedrive, Salesforce, TribeCRM, Zoho .
- **Note:** You can only have **one** CRM integration active at a time.

💎 Data Enrichment

Plug in your data enrichment tools to optimize outreach and verify data:

- **Apollo:** Lead enrichment tool, email discovery, and engagement tracking.
- **Cognism:** Global databases to identify and connect with prospects.
- **Datagma:** AI-based platform to enrich business insights and qualify leads.
- **Dropcontact:** Update, enrich, and verify data directly within CRMs.
- **Hunter:** Find and verify professional email addresses.
- **Kaspr:** Retrieves contact data (emails/phones) from LinkedIn.
- **Lusha:** Enriches contact data with verified emails and direct dials.
- **ZoomInfo:** Business intelligence databases for finding and qualifying leads.
- **Proxycurl:** Provides APIs for detailed contact and company profiles.

🤖 AI Enrichment

- **OpenAI:** If you have an OpenAI subscription, you can connect it here to use your own credits for generating AI variable outputs instead of using Genesy's credits.

📥 Import Sources

- **TheirStack:** Aggregates and imports data from multiple platforms. You can connect your own account, or if not, use Genesy's subscription by consuming your plan's credits when importing companies .

💬 Communication

- **Slack:** Connect Slack to enable team communications and workflows.

CRM Configuration Guide ⚙️

To configure a CRM, first enable it via the toggle switch, then click the **Configure** button on the specific CRM card (e.g., HubSpot).

The setup process is divided into 4 steps:

Step 1: Input/Sync Mapping

This step defines how Genesy matches contacts and companies with your CRM records to prevent duplicates and ensure data integrity.

Contact Identifier: Choose how to match contacts:

- **Preset:** "First name + Last name + Company name" OR "LinkedIn profile URL".
- **Custom Mapping:** Opens a pop-up to define custom conditions using **AND/OR** logic (e.g., Match by ∗First Name *AND* Last Name*, OR by* Professional Email*) .

Company Identifier: Choose how to match companies:

- **Preset:** "Domain" or "Domain or Company Name".
- *Tip:* You can check a box to include any domain extension (e.g., .es, .com, .org).
- **Custom Mapping:** Define custom matching conditions (e.g., Match by ∗Domain *OR* Company LinkedIn URL∗).

Step 2: Export Mapping

Here you configure which Genesy fields map to which CRM fields when exporting data. This is divided into **Contacts** and **Companies** tabs .

Field Types:

- **Genesy Fields:** Standard list fields (e.g., Phone Number, Job Title). You can map these to CRM fields and check the **Overwrite** box if you want new data to replace existing CRM values.
- **Fixed Fields:** Fields that always export with the same static value.
- *Example:* Map a CRM field called "Source" to a Fixed Value of "Genesy" .
- **Export Fields:** Configure specific values for export.
- **Engagement Field:** Fields configured when an Activity is created in the CRM.
- **Association Type:** Defines the relationship character. Options include:
- Add association as Primary.
- Add as additional association.
- Associate as primary and remove previous associations (Not recommended).

⚠️ **Important:** Do not map a Company field in the Contacts tab or vice-versa, as this will cause export errors.

Step 3: Campaign Mapping (Optional)

This step allows you to sync campaign-specific properties to your CRM. Available properties include:

- **Campaign Sequence Details:** The steps included in the campaign (e.g., "1st Email, LinkedIn Connection Request").
- **Campaign Engagement Status:** The current status of the lead (e.g., "Message Sent (1/3)").
- **Campaign Opens/Clicks:** Total number of times a lead opened an email or clicked a link .
- **Campaign Analysis (Open/Click/Reply):** Detailed breakdown indicating "Yes" or "No" for each specific message sent (e.g., "Yes (1st Message)") .

- **Sequence Status:** The overall status: 'Not Started', 'Ongoing', 'Replied', or 'Finished' .

Step 4: User Mapping

This final step defines the associations between users in Genesy and users in the CRM.

- **Identities Mapping:** Links a **Genesy Identity** (the profile running the campaign) to a **CRM User**. This ensures that the activity log in the CRM reflects the correct user who executed the action .
- **Users Mapping:** Links a **Genesy User** (the account user) to a **CRM User**. This sets the default owner for exports. If CRM users have different permissions, this association will respect those limits .

Click **Update** to save your configuration.