

Importing and enriching companies from CRM

Do you have a list of companies in your CRM and want to import it into Genesy to enrich them and find new potential contacts? This guide walks you through the entire process step by step:



1. CRM Integration

Before starting, make sure your CRM is integrated with Genesy.

If not, check the appropriate guide for your CRM:

- [Integrating with HubSpot](#)
- [Integrating with Salesforce](#)
- [Integrating with Dynamics](#)
- [Pipedrive Integration](#)
- [Other supported CRMs](#)

Note: If your CRM is not available, you can import data using a CSV file (see below).

2. Import from CRM

- Go to **Lists > Create new**
- Choose whether to import **Companies** or **Contacts**
- Click on **Import from CRM**
- You can apply filters or import a full list directly

CRM not listed? Export your data as a **CSV** file and upload it manually to Genesy: [How to import a CSV file into Genesy](#).

Important: When importing from a CSV file, **create a custom field for the CRM ID**. This allows proper mapping back to the CRM, as other fields may change after enrichment.

🧠 3. Enrich the Company List Once imported, you can enrich company data using LinkedIn information.

If you have the LinkedIn URL: Select the companies > **Enrichment > Find data from LinkedIn by URL**

🔎 If you DO NOT have the URL: Select the companies >**Enrichment > Find data from LinkedIn by name**

💡 **Tip:** If the company domain is missing, select "**Match only if name is similar**". You can also filter by region to improve accuracy.

🤖 4. Add Additional Info Using AI Are there fields not available on LinkedIn but easy to find on the company's website, Google, or Google News?

Use **Genesy AI Variables** to retrieve this info:

Create an AI Variable:

- Click between two column headers > "+" > **Create new AI variable**
- Enter your custom *prompt*
- Use variables like `{company_name}`, `{description}`, etc.
- Choose the sources to search:
- Company website
- Google
- Google News
- Set the output type:
- Text, number, date, or picklist

Run the AI Variable:

Select the companies > **Enrich > Enrich with AI > AI Fields** > choose the fields > **Fill**

💬 5. Find Contacts Within Companies

- Select the companies you're interested in
- Go to **Enrichment > Add contacts to company**
- Apply filters (job title, department, country, etc.)
- Create a list with the matched contacts

 6. Enrich the Contact List To add email addresses and phone numbers:

- Go to **Enrichment > Enrich phone number and email address**

 If you only need emails, you can choose to enrich email fields only.
