Import companies from Dynamics

Do you have companies in **Dynamics** that you wish to import in Genesy to enrich and add contacts?

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

Follow these steps:

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1️⃣ Import the companies to a list

- Go to **Companies > Create new company list >** add a name to the list

- Select **Import** > select your desired import option from Dynamics.

- Import from Dynamics list

- Find companies in Dynamics (by using filters)

##

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

Field name in Genesy

| **Property name in Dynamics**

| name

| name

| Website

| website

| Domain

| domain

| Street Address

| address

| City

| city

| Country

| country

| Description

| description

| industry

| industry

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Want to retrieve more fields than the above mentioned?

Check out our article 👉 How to customize CRM Import

2️⃣ **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

Find data from Linkedin by URL vs Find Data from LinkedIn by name

3️⃣ 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?

- **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)

1. **Run AI Variable** following these steps:

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

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4️⃣ Search for contacts within these companies

- Select companies from the list > **Enrich > Add contacts to company**.

- Add filters to identify the people you're interested in within those companies.

- Create a list of contacts by including the person and company filters in the name (e.g., **CEOs and Sales Decision Makers / B2B SAAS / <50 employees / Spain**)

🚨 **Reminder**: When importing companies from Dynamics, remember to **Find Data from LinkedIn by URL / Name**. 👉 Check the guide here.