Importing and enriching contacts from CRM

Do you have a list of contacts in your CRM and want to import it into Genesy to enrich the data and add new potential contacts?

In this guide, we'll walk you through how to import your contacts into the platform, enrich them, and discover new opportunities.

🔗 CRM Integration

Before importing contacts, make sure your CRM is integrated with Genesy.

📌 **Haven't connected your CRM yet?** Here are the guides for integrating each CRM:

- HubSpot Integration
- Salesforce Integration
- Dynamics Integration
- Pipedrive Integration

📥 Import from CRM

Once your CRM is connected, follow these steps:

- Go to **Lists > Create new**.
- Navigate to **Contacts** and select **Import from CRM**.
- You can:
- Search your CRM using filters.
- Or import a saved list directly.

💡 **Your CRM isn't listed?** Export the contact data as a **CSV file** and upload it to Genesy manually.

👉 How to import a CSV file into Genesy

⚠️ **Important:** When importing from a CSV file, make sure to **create a custom field** to store the **CRM ID**. This helps map it back to your CRM later, since other fields might change after enrichment.

🧠 Enriching Your Contact List

Once the list is imported, the next step is enriching the contacts using LinkedIn data.

🔗 If you have the LinkedIn URL for each contact:

- Select the contacts from the list.

- **Enrichment > Find data from LinkedIn by URL**

🔍 If you don't have the LinkedIn URL:

- Select the contacts from the list.

- **Enrichment > Find data from LinkedIn by name**

📧 Add Emails and Phone Numbers:

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

- If you don't need phone numbers, you can enrich **emails only**.

🤖 Adding Extra Info Using AI Are there any fields missing from LinkedIn but easy to find on the company's website, Google, or Google News?

You can create an **AI Variable** to retrieve this information automatically.

🛠️ How to create an AI variable:

- In your contact table, go between two column headers and click on the **"+"** icon.

- Select **Create new AI variable**.

- Write a **prompt** explaining what to retrieve.

- You can reference existing Genesy fields using `{field_name}` .

- Choose where to search:

- Company Website

- Google

- Google News

(If the data is already available in Genesy, leave all checkboxes empty.)

- Set the output type:

- Text

- Number

- Date

- Option (picklist)

▶️ Run the AI variable:

- Select the companies you want to enrich.

- Go to: **Enrich > Enrich with AI**

- Choose the AI variables you want to fill in.

- Click **Fill**.