IDENTITIES

In the **Identities** section, you can configure the profiles you will use within Genesy. An identity represents the channel through which you will contact leads; you can set up a **LinkedIn profile**, an **Email address**, or both .

Identities are primarily used to run campaigns, map CRM users, and synchronize campaign activity .

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1. The Identities Dashboard

The main screen provides an overview of your active identities and their performance.

🔍 Search & Filters

- **Search Bar:** Quickly find an established identity by name.
- **Date Filter:** Modify the timeframe for the displayed statistics (default is "Today"). This affects the data shown in the performance cards.

📊 Performance Statistics

The dashboard displays four key metrics based on the selected period:

- **Connections:** A comparison between LinkedIn connection requests **accepted** vs. total requests **sent**.
- **Messages Sent:** Total messages sent vs. the total possible messages allowed (default limit is 100 per day per identity).
- **Replied:** The number of emails that have received a response.
- **Bounce Rate:** The percentage of emails that bounced.

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2. Adding a New Identity

To add an identity, click the **+ Add new identity** button at the top right. While connecting LinkedIn and Email is not strictly necessary to create the identity manually, you need at least one of them connected to properly run campaigns on those specific channels .

There are three ways to add an identity:

Option A: Credentials (LinkedIn Login)

Connect directly by entering your LinkedIn login details.

- **Requirements:** Identity Name, LinkedIn Email, LinkedIn Password.
- **MFA/2FA:** If your profile has Two-Step Authentication, you will need to provide the access code during the linking process.
- **Important:** You cannot connect successfully if you use social logins (Google, Microsoft, Apple) or an Access Key. You must set a password in LinkedIn settings first.

Option B: Manually

Create the identity profile by manually filling in the data fields:

- Profile picture (Upload).
- First Name & Last Name.
- Job Title.
- Email.
- LinkedIn URL.
- Schedule Meeting URL .

Option C: Share (Generate Link)

This feature allows people without a Genesy account (e.g., team members, contractors, partners) to add their identity to your organization.

1. Click **Generate Share Link**.
2. Share the link with the person.
3. They can use the link to securely connect their LinkedIn account via a browser without needing platform access.

- **Note:** The link is temporary (valid for **24 hours**) and can only be used **once** .

3. Identity Configuration

Once created, click the **Configuration** button on an identity to access its settings.

👤 Contact Details

This section is populated automatically if you connected a LinkedIn account, or with the data you entered manually. You can edit:

- **Personal Info:** Name, Job Title, LinkedIn URL, Email, Schedule Meeting URL, Phone Number .
- **Working Hours:** Specify the time zone and days/hours the identity is active. Campaigns associated with this identity will only execute actions during these specified times .

👔 LinkedIn Settings

This section has two tabs:

1. Rate Limits

Define the daily activity limits for the identity:

- **Daily connection requests:** Default is **20**. Increasing this carries a risk of LinkedIn detecting automation and restricting the account .
- **Daily messages limit:** Default is **100**. Significant increases are not recommended.
- **Daily scrapings:** (Only for identities with **Sales Navigator**). This indicates the number of scrapings the identity can perform *in addition* to the account's pool. It uses the combined capacity of the Genesy pool + the identity's Sales Navigator capacity .

2. Withdrawals

Manage pending connection requests:

- **Automatic Management:** Enable **"Automatically withdraw pending invitations"** and set a number of days (e.g., 7 days). Invitations pending longer than this will be removed .

- **Manual Withdrawal:** Select and withdraw pending requests in bulk.
- **Important Rule:** Once you withdraw a request, you cannot resend a request to the same person for **3 weeks**.

📧 Email Settings

This section has three tabs:

1. Manage

Connect one or multiple email addresses (Google, Microsoft, or IMAP).

- **Load Balancing:** The system distributes the lead load among all connected addresses .
- **Warning:** If a lead starts a sequence with a specific address and you disconnect that address later, the lead will error out. You must reconnect the original address to resolve it.
- **Warm-up Feature:** A service to train the email address and increase deliverability (reduce Spam).
    - **Cost:** 50€.
    - **Duration:** ~3 weeks.
    - **Requirement:** You must pause all campaigns using this identity and avoid sending external emails during the warm-up period .

2. Email Rate

Configure sending limits to avoid Spam detection.

- **Daily Limit:** Recommended **30** emails per inbox.
- **Hourly Limit:** Recommended **5** emails per inbox .

3. Signature

Create or edit the email signature for this identity. You can use the text editor or switch to **Advanced HTML Mode** to paste code directly.

🔗 Share Identity Link (Update)

Inside the configuration menu, the "Share identity link" button generates a link to **update** the identity. This allows the owner of the identity to refresh their connection status (LinkedIn or Email) without needing platform credentials .