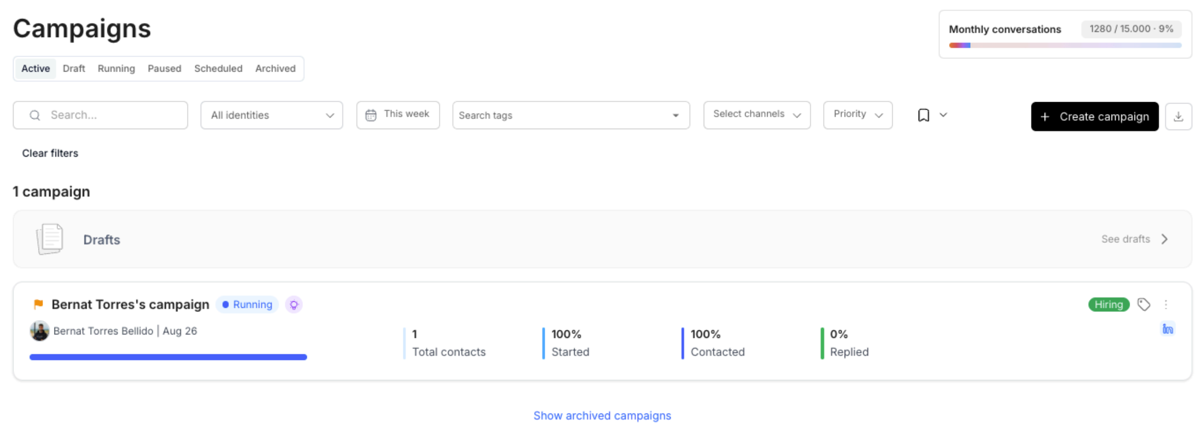
Campaigns

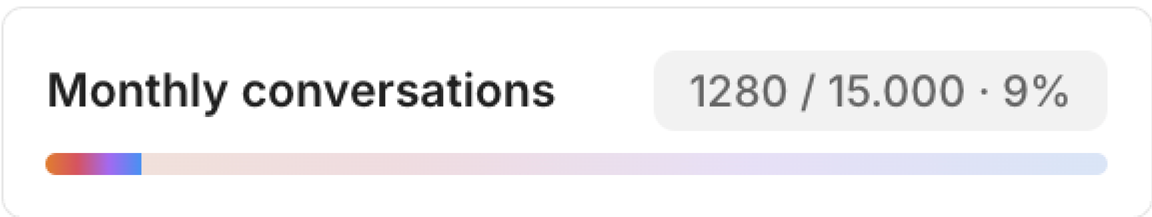
The **Campaigns** section offers all the information related to campaigns. A campaign in Genesy is a programmable sequence that is launched towards the prospects with whom we want to generate interaction or connection, that is, towards the Contacts that we have in our lists and that are of interest to us.

These sequences include several actions structured either linearly or in the form of a tree by means of a series of conditions.

The two channels taken are LinkedIn and/or Email. Each campaign can take a different approach, a different sequence, a general tonality, and be specific to a particular segment. To launch a campaign, all that is required is to have an identity connected to the account, which can necessarily be associated to one or several campaigns at the same time.



In this section, at the top right we can see the Monthly conversations, which indicates the number of new conversations that can be opened monthly. It does not count the number of messages sent, but the number of new conversations opened.



In the Campaigns section we can filter them by:

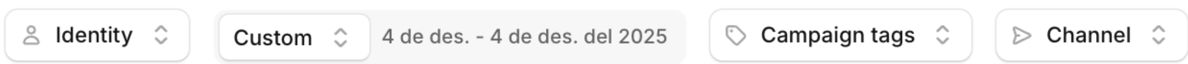
Status:

- Active
- Draft
- Running
- Paused
- Scheduled
- Archived

Search engine:

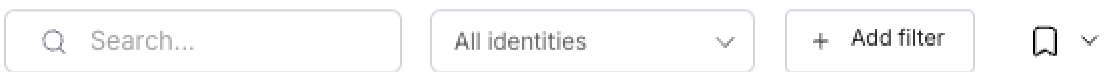
- By campaign name or associated identity

Filters:



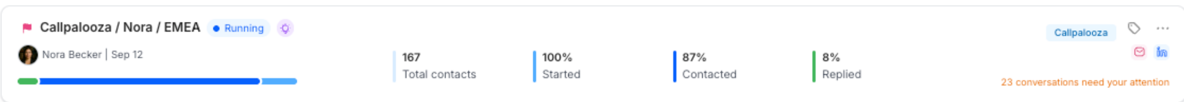
- Identity associated with the campaign
- Time period in which it was created
- Tags associated
- Type of channel linked (Email, LinkedIn, Task)
- Priority

Once applied, filters can be saved from the save icon in the image (to the right of the filters). It is worth mentioning that by default only the search engine and the associated identity filter are visible, although all the others can be added from the '+ Add filter' button.



Each campaign appears visually as a card as a summary, where we see:

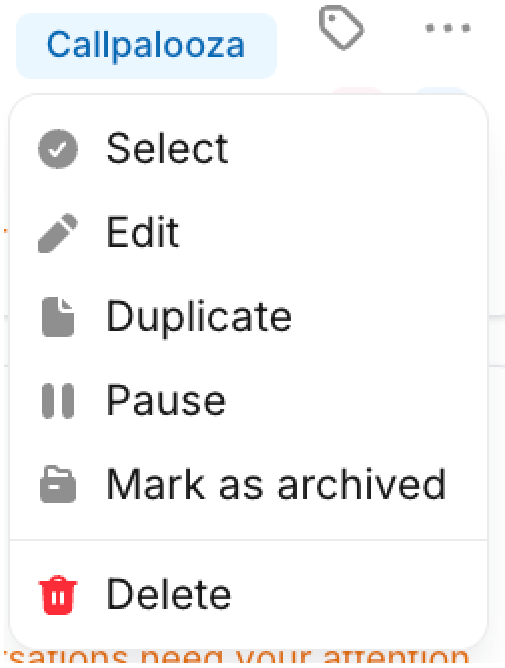
- **Priority flag** → If there are many campaigns launched, it is convenient to define priorities (High, Medium, Low) because the number of actions is limited in time (for example, the limit of connection requests on LinkedIn per day).
- **Campaign name** → The name we have defined for a campaign.
- **Status** → This status can be Running, Paused or Archived.
- **Associated identity** → Only one identity can be associated to each campaign. It must be considered that if the identity does not have an Email connected, if the campaign includes Email actions, these actions will block the progress of the sequence. If this happens, when an Email is connected, it will be unblocked and the campaign will advance correctly. But surely a retry of the leads that have been blocked will have to be done.
- **Creation date** → The day the campaign was created.
- **Total contacts** included in the campaign, and **percentages** of contacts who have started the campaign (i.e. to whom any action has already been taken), of contacts contacted (to whom a LinkedIn or Email message has already been sent), and of contacts who have responded to any Email or LinkedIn message.
- **Campaign Tags** → Each campaign can have one or more identifying Tags. Important: do not confuse neither with AI Tags (which are for conversations), nor with List Tags (which are for lists).
- **Linked channel/s** → If the campaign contains LinkedIn and/or Email and/or Tasks actions, the respective icons will be visible on the card.



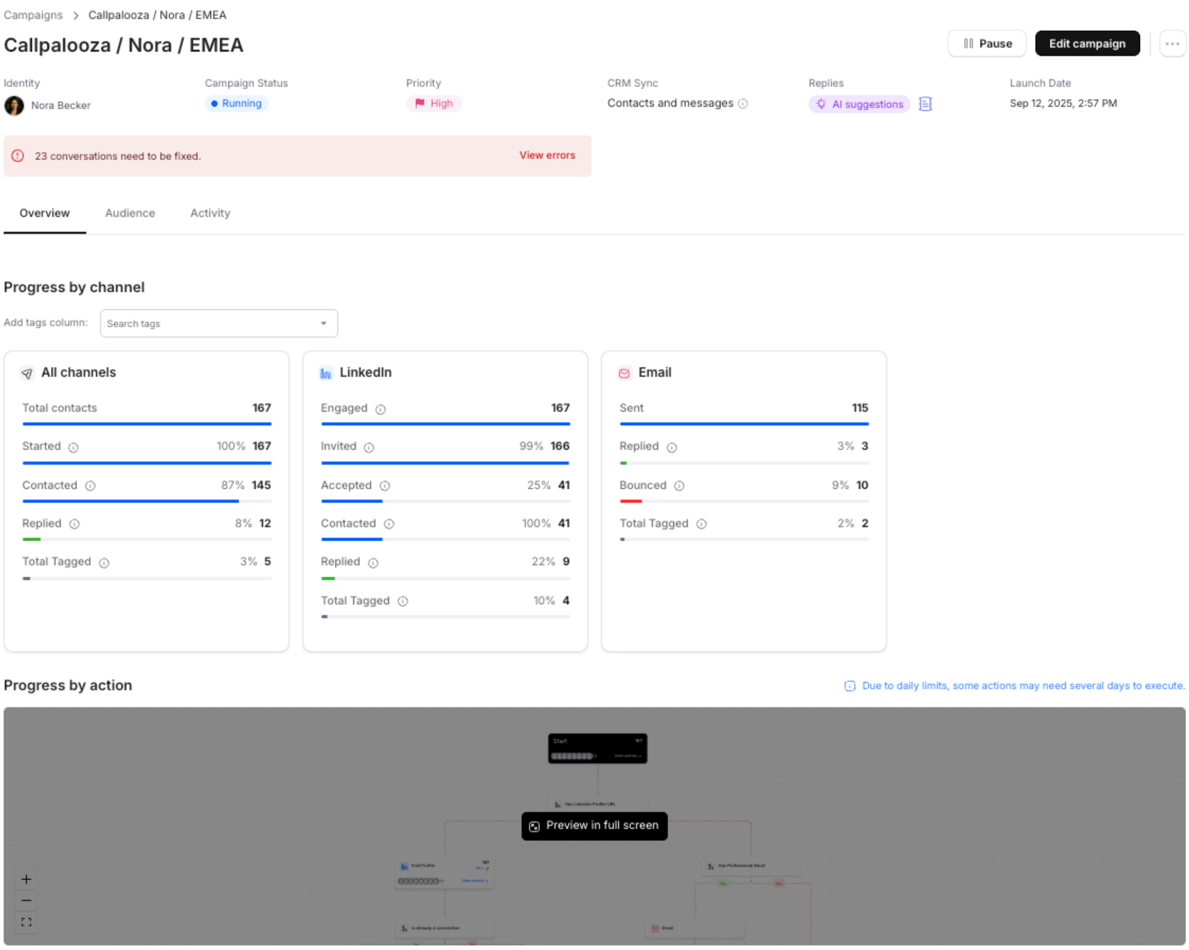
At the top right of the card there are three little dots that after clicking on them will display a menu with quick actions such as:

- **Select**
- **Edit**
- **Duplicate**

- **Pause**
- **Mark as archived**
- **Delete**



If we click on any of these campaign cards, we can see each of them in detail:



Then, a view of the campaign opens, with its title and generic information at the top:

- **Identity** → Name of the identity associated with the campaign.
- **Campaign Status** → Status of the campaign:
  - Running → The campaign is still running.
  - Paused → The running of the campaign has been paused.
  - Archived → The campaign has been deactivated.
- **Priority** → Priority defines which actions will be performed before others, taking into account that there are some limitations indirectly imposed by LinkedIn, such as sending connection requests, sending messages or visiting profiles. They are not strict, although there is a risk that LinkedIn may detect suspicious activity and temporarily restrict access to your account. For that reason there are recommendations for the number of messages and connection requests per day, which can be viewed and configured from the identity itself. The priority can be one of the following:

- High
- Medium
- Low

- **CRM Sync** → In the campaign settings you can enable an export of the messages of the conversation with each lead, or of the lead itself. There are three options:
  - No → Never.
  - Yes → Always. The messages of the conversation will be exported, even if the lead does not reply to them.
  - Only when a contact replies → Only when a contact replies to a message. At that time, all messages in the conversation will be exported.
- **Replies** → In the campaign settings you can choose the option for an AI agent (which is an AI Campaign) to generate the replies to the messages sent to you by the lead automatically. You can also configure whether you want it to send those replies directly or if you just want it to suggest it in the text box within the conversation and then you click send.
- **Launch Date** → The date on which the campaign was launched.

Just below this generic information are the 3 main tabs of a campaign view:

Overview

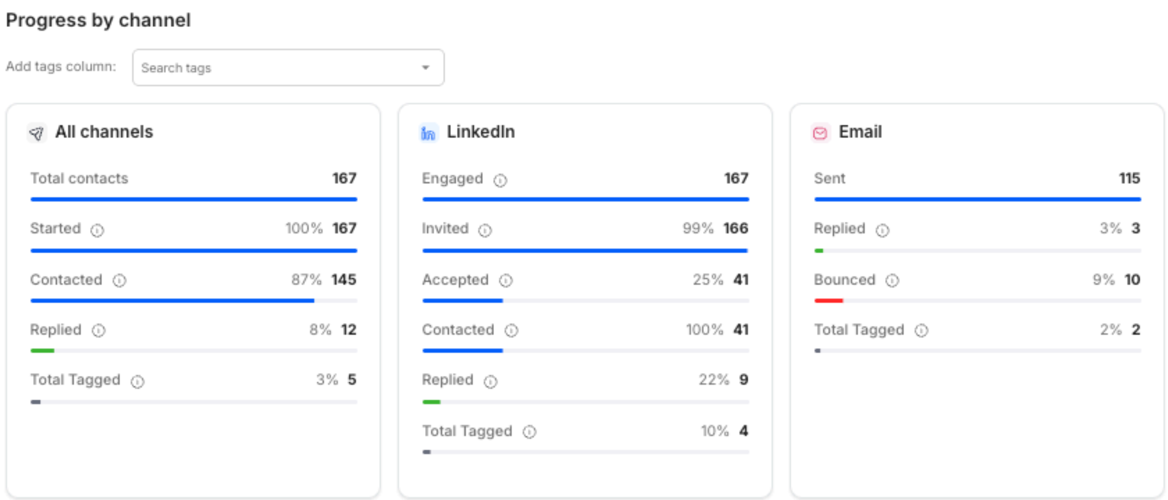
In Overview we can see two main parts:

Progress by channel

Where there are campaign statistics info cards:

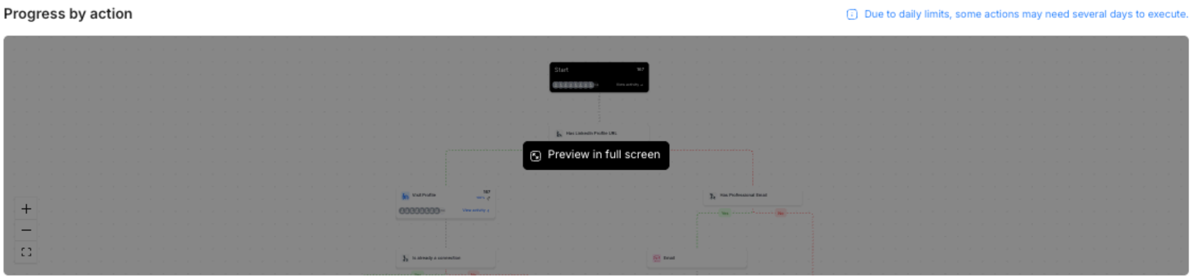
- All channels → Including all channels of the campaign, what is analyzed is:
  - Total contacts
  - Started
  - Contacted
  - Replied
  - Total Tagged

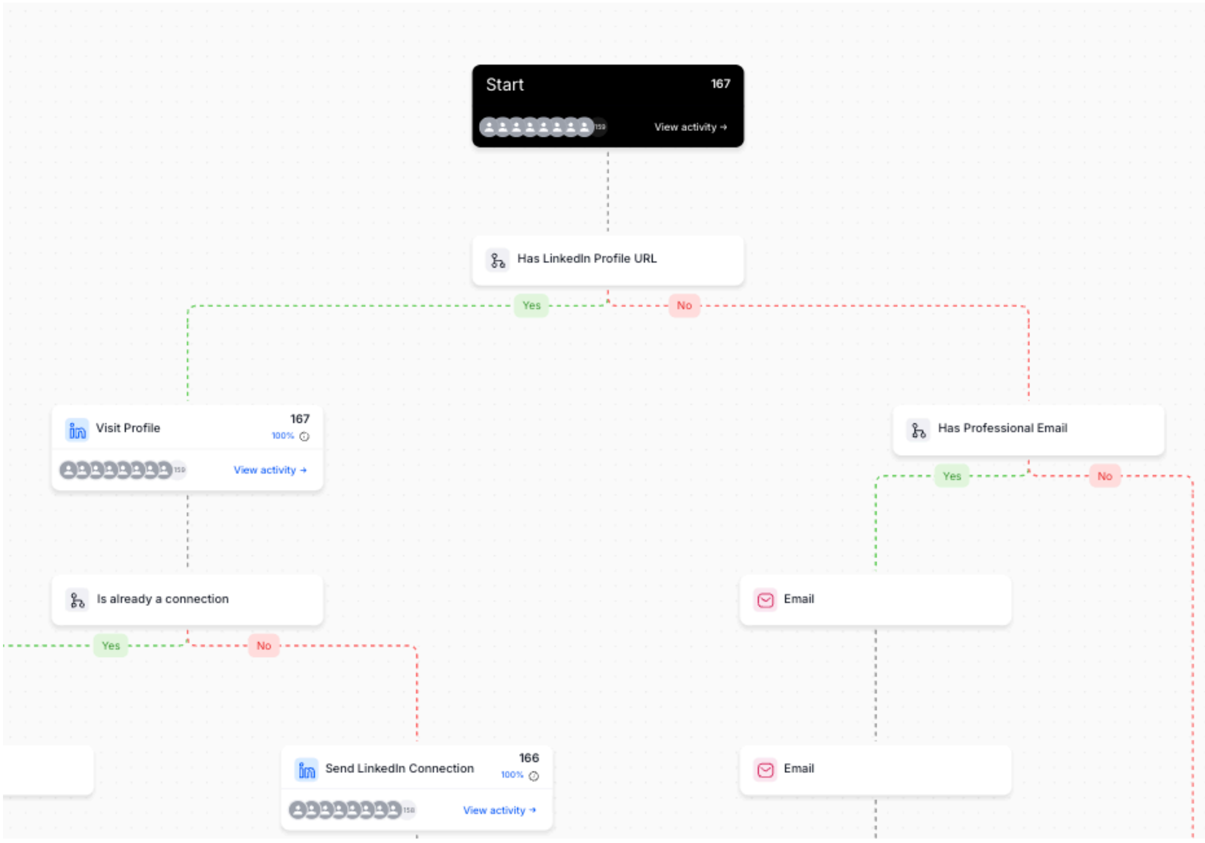
- LinkedIn → Considering only the LinkedIn channel, what is analyzed is:
    - Engaged
    - Invited
    - Accepted
    - Contacted
    - Replied
    - Total Tagged
- Email → Considering only the Email channel, what is analyzed is:
    - Sent
    - Viewed
    - Clicked
    - Replied
    - Bounced
    - Total Tagged



Progress by action

Where we can see the preview of the sequence, with the count of leads that have passed through each step.



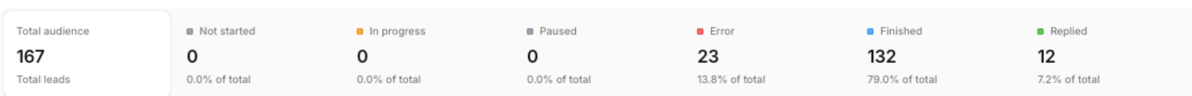


If we click on View activity in any of the steps we are taken to another tab: Activity.

Audience

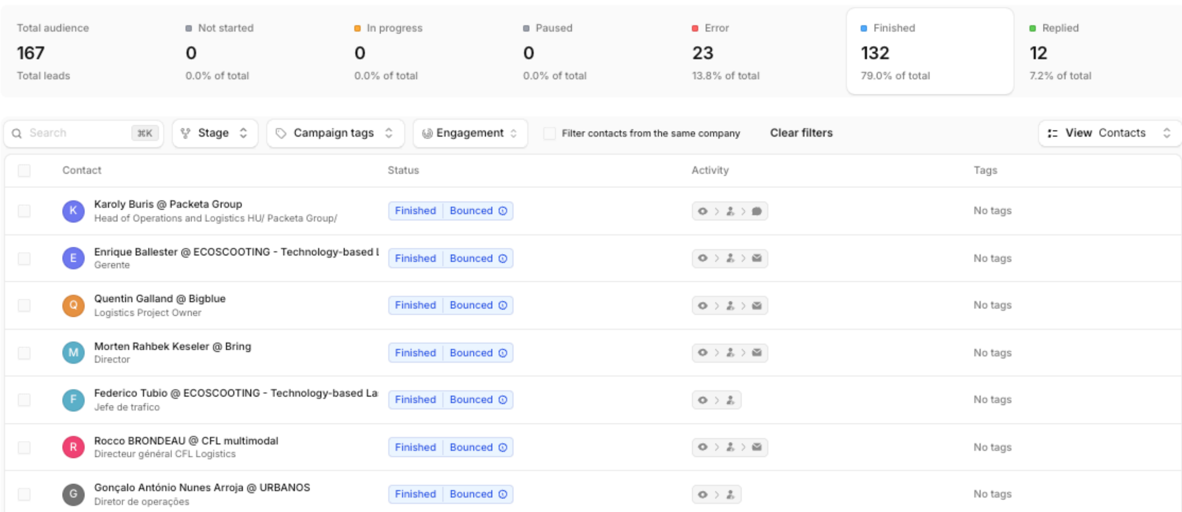
Audience shows all the contacts included in a campaign, along with their current status. This is the ideal view to understand the reach of your campaign.

A numerical summary of the campaign status is displayed at the top:



- **Total audience** → All contacts in the campaign.
- **Not started** → Those who have not yet reached the execution of the first action of the campaign.
- **In progress** → Those who have already started and are following the course of the campaign.
- **Paused** → Those that have been manually paused.
- **Error** → Those that have some error that prevents the progress of the campaign in some action.
- **Finished** → Those who have either finished the campaign sequence and have not yet responded, or who have bounced after sending them an email from the campaign.
- **Replied** → Those who have responded to some message sent through the campaign.

Just below, depending on which status we have selected, we see a list of the leads that belong to that status, i.e. it is a filter in itself:



On those statuses we can apply other filters:

- **Search bar** → directly search by lead name or lead's company name.
- **Stage** → filter leads by sequence action (it is the same as progress by action).
- **Conversation tags** → filter by**conversation** tag.

- **Engagement** → filter by certain engagement conditions.
  - LinkedIn connection sent
  - LinkedIn connection accepted
  - LinkedIn connection sent but not by platform
  - Sent at least one message
  - Bounced message
  - Seen message
  - Clicked conversation → the number of times an email has been opened. You must have the 'track email opens' setting activated in the campaign.
- **Filter contacts from the same company** → 'checkbox' to show only the leads of a campaign which work in the same company.
- **View** → Additionally there is the 'View' dropdown at the bottom right in the filter bar mentioned above, which allows you to change how the contact information is displayed in the list. The two possible 'Views' are these:
  - Contacts → Format "Name @ Company" and underneath the "Job Title".
  - Companies → Format "Job Title @ Company" and underneath the "Name".

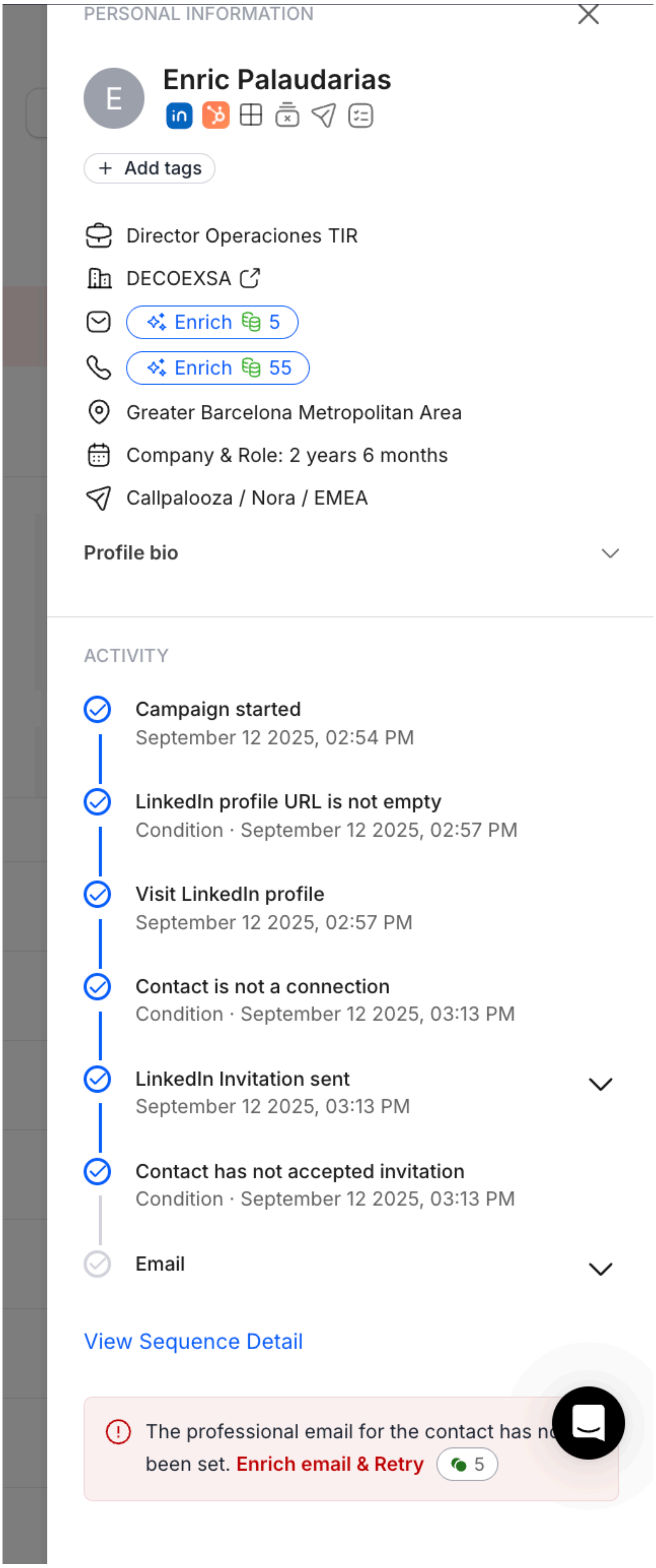
And in each row of the list there are these columns:

- **Contact** → Name, Company and Job Title.
- **Status** → label with the format "Status + specific reason". Hovering over it a tooltip details more specific information about it.
- **Activity** → icons of the last activity, excluding conditions. Hovering the mouse over a tooltip details what action it is.
- **Conversation tags** → **Conversation** tag, which can be assigned manually or automatically through the IA based on a prompt.

Finally, clicking on any of the rows displays a side panel on the right with the following:

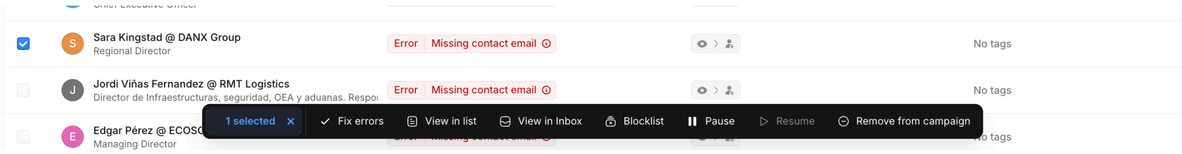
- Lead personal information, and shortcuts to LinkedIn, CRM, Tableau, Inbox, add to another Campaign, and create a Task.

- And each step of the sequence through which it has already passed, and a banner that is the Status tooltip.


PERSONAL INFORMATION
E
Enric Palaudarias
+ Add tags
Director Operaciones TIR
DECOEXSA
Enrich 5
Enrich 55
Greater Barcelona Metropolitan Area
Company & Role: 2 years 6 months
Callpalooza / Nora / EMEA
Profile bio
ACTIVITY
Campaign started
September 12 2025, 02:54 PM
LinkedIn profile URL is not empty
Condition · September 12 2025, 02:57 PM
Visit LinkedIn profile
September 12 2025, 02:57 PM
Contact is not a connection
Condition · September 12 2025, 03:13 PM
LinkedIn Invitation sent
September 12 2025, 03:13 PM
Contact has not accepted invitation
Condition · September 12 2025, 03:13 PM
Email
View Sequence Detail
The professional email for the contact has n
been set. Enrich email & Retry
5

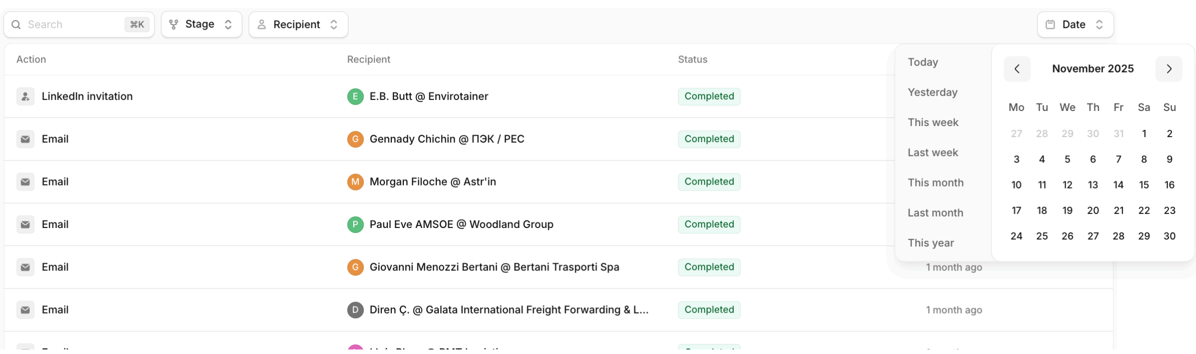
By selecting the checkbox on the left of each row we can select each lead, and just below appears a popup with a series of actions:

- **Retry errors** → only for leads with Status - Error, there is the retry option that is intended for when we have solved them. This action only appears in this popup if the lead is in Status - Error.
- **View in list** → takes us to the list showing only the selected leads.
- **View in Inbox** → takes us to the Inbox showing only the selected leads.
- **Pause** → freezes the course of the campaign for the selected leads.
- **Resume** → resumes the course of the campaign for the paused leads.
- **Remove from campaign** → removes the lead from that campaign. Once removed, it cannot be added back to the same campaign.



Activity

Activity lists all the activities performed in the campaign sequence. All actions, excluding conditions.



In this list we can apply the following filters:

- **Search bar** → directly search by lead name or lead company name.
- **Stage** → filter leads by action in the sequence (the same as progress by action).
- **Recipient** → contact for whom you want to see the activity that has been performed.

- **Date** → time range in which the activity was performed.

And in each row of the list there are these columns:

- **Action** → is the activity itself.
- **Recipient** → is the lead in Name @ Company format.
- **Status** → here it can be 'Completed' or 'In Progress'.
- **Completed** → the time it was completed.

At the top right in this Campaigns section there is a button to create a new campaign, and to its right another one to download the metrics and total campaign statistics in CSV format.