

Add new identity

The identities are mainly used to run your campaigns, taking an identity for each campaign when executing its scheduled actions. But also for mapping with your CRM user to sync the campaign activity.

In each identity you can connect LinkedIn and Email, although those connections are not necessary to create it manually. But at least one of them is necessary to use it properly in the campaigns, since only with LinkedIn or Email you can use the identity in a campaign which only contains actions from one of those two channels that you have connected to it.

By clicking the '**Add new identity**' button you can add a new **identity** to your Genesy account. There are two possible options, in the window that appears each one is shown in a tab:

- **Credentials** → Through this option you create the identity by connecting directly to a LinkedIn profile, so you will need to name the identity and add the credentials you use to log in to LinkedIn.

Keep in mind that if your LinkedIn profile has two-step authentication or MFA*(Multi Factor Authentication*) you will need to give access when you are linking it. Also keep in mind that if you use login via Google, Microsoft, Apple or Access Key, you will not be able to connect it successfully, i.e. you will probably have to give permissions before from LinkedIn settings.

Iniciar sesión

 Continue with Google

 Iniciar sesión con Microsoft

 Iniciar sesión con Apple

Inicia sesión con una llave de a...

0

Add LinkedIn Account

Credentials

Manually

Share



Connect Genesys to LinkedIn

Identity Name

LinkedIn Email

LinkedIn Password



Connect

- ☑ All your data is encrypted and stored securely
- ☑ LinkedIn may ask us for a code to verify the login. We will ask you to enter that code if so
- ☑ It may take a few seconds to connect your account, please be patient


- **Manually** → Through this other option you will be able to create the identity manually, you will simply have to fill in the following information:

- Profile picture
- First Name
- Last Name
- Job Title
- Email
- LinkedIn URL
- Schedule Meeting URL

Add LinkedIn Account

Credentials **Manually** Share

Profile picture

 [Upload new picture](#)

First Name

Last Name

Job Title

Email

LinkedIn URL

Schedule Meeting URL

Create Identity

In addition to these two ways to create the identity, there is a third tab called **Share**. There is a 'Generate Share Link' button that generates a temporary one-time access link so that a person who is not a user of the account can still connect their identity in order to use it in campaigns. This link will be opened in the browser and the person will have the two options mentioned above to create their identity in Genesys.

Add LinkedIn Account


CredentialsManuallyShare


Share Identity Link

Use this feature to allow people without a Genesys account to add their identity to your organization. Perfect for team members, contractors, or partners who need to manage their own LinkedIn identity.

How it works:

- Generate a secure temporary link (valid for 24 hours)
- Share the link with the person who needs to add their identity
- They can use the link to securely connect their LinkedIn account
- No Genesys account required for them
- **Important: Each link can only be used once**

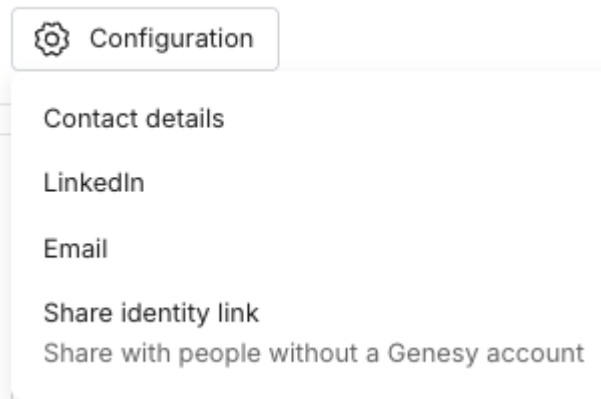
 Generate Share Link

 **Security Notice:** This link provides temporary, one-time access to add an identity to your organization. Once used, the link becomes invalid. Only share it with authorized personnel.

Configuration

Once the identity is created, clicking on the 'Configuration' button displays different parameters and configuration options.

- **Contact details**
- **LinkedIn**
- **Email**
- **Share identity link**



Contact details


If you have connected a LinkedIn account when creating the identity, this information will be populated with the information from the LinkedIn profile. If you created the identity manually, this section will be populated with the information you included when creating the identity.

However, you can edit the contact information:

- **Profile picture**
- **First name**
- **Last name**
- **Job Title**
- **LinkedIn URL**
- **Email**
- **Schedule Meeting URL**
- **Phone Number**
- **Working hours** → From Contact details you can add the Working hours configuration. Basically the working hours, which specifies the times when the identity will be active and will execute actions of the campaigns it has associated, i.e. when the campaign will run (depending on how it is scheduled).

Contact Details

Profile picture



Upload new picture

First Name
Kai

Last Name
Brandt

Job Title
CEO & Founder at Genesy

LinkedIn URL
<https://www.linkedin.com/in/kaibrandtlopez>

Email
john.doe@example.com

Schedule Meeting URL
<https://calendly.com/kai-brandt/>

Phone Number
+34608901726

Working hours

Select time zone
(GMT+01:00) Madrid

Select day(s)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Sunday	Start 09:00 End 18:00						
Monday		Start 09:00 End 18:00					
Tuesday			Start 09:00 End 18:00				
Wednesday				Start 09:00 End 18:00			
Thursday					Start 09:00 End 18:00		
Friday						Start 09:00 End 18:00	
Saturday							Start 09:00 End 18:00

Cancel Update

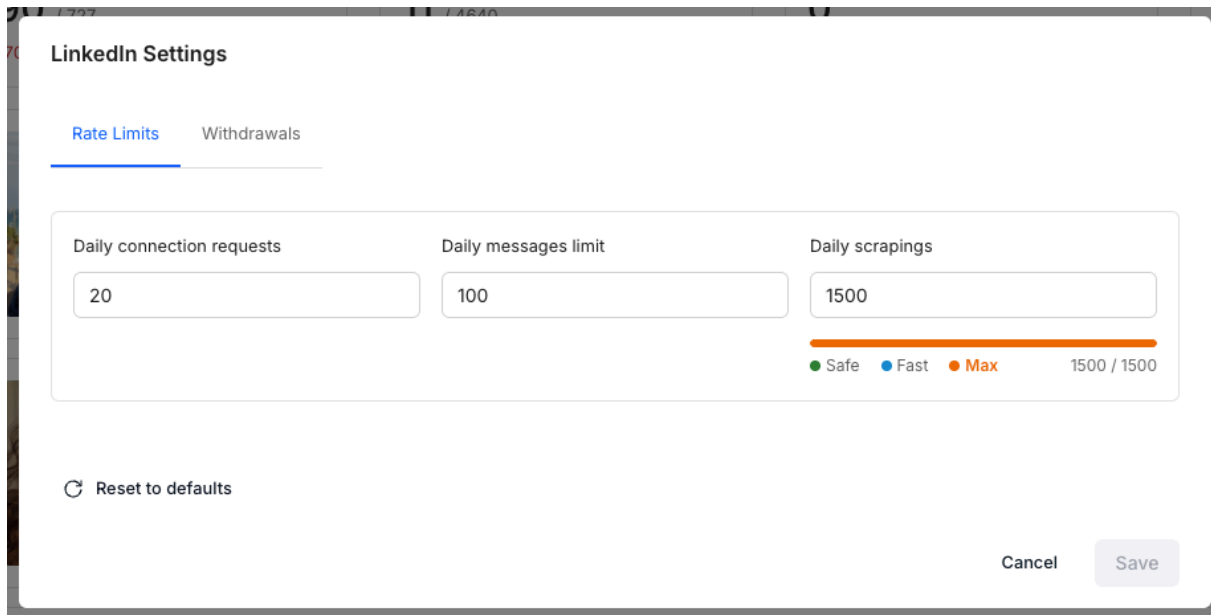
LinkedIn

In the LinkedIn settings you will see two tabs:

- **Rate Limits**

Here you will be able to define the limits of the LinkedIn identity, in relation to:

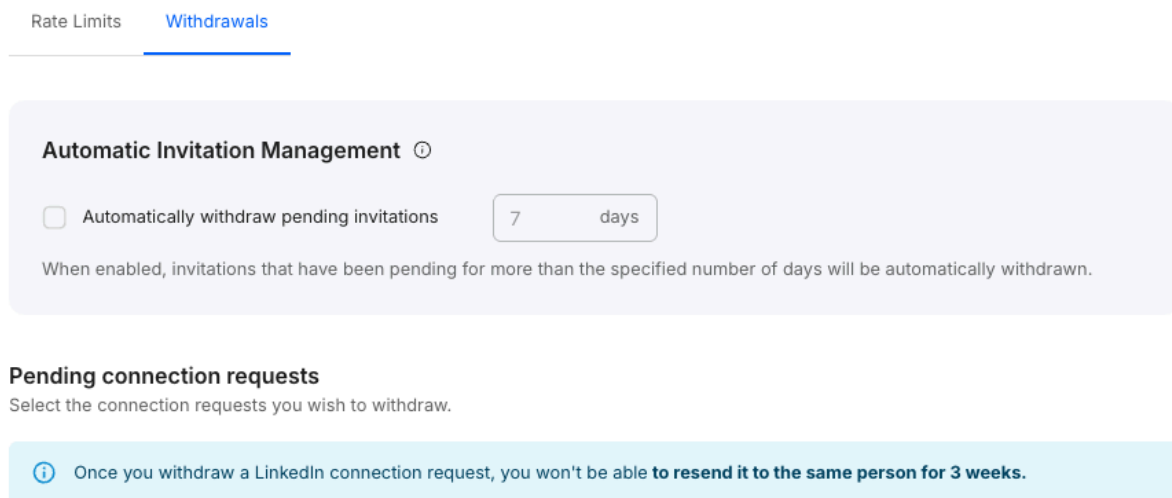
- Daily connection requests → The default limit is 20 requests per day. It can be increased, with the risk that LinkedIn will detect it as an automation and temporarily restrict you from accessing your account, so it is not recommended to increase it much more, and if you do, temporarily.
- Daily messages limit → This is set to 100, and for the same reason it is not recommended to increase it much more than that.
- Daily scrapings → This setting is only for identities using LinkedIn Sales Navigator. It indicates the number of scrapings the identity can perform, apart from the account pool. That is, each account uses a part of Genesy's scrapings capacity, and that is called pool. But in these cases when the identity has Sales Navigator, the capacity of this pool + the capacity of the identity is used, because it has Sales Navigator.



The screenshot shows the 'LinkedIn Settings' window with the 'Rate Limits' tab selected. It contains three input fields: 'Daily connection requests' with the value 20, 'Daily messages limit' with the value 100, and 'Daily scrapings' with the value 1500. Below the 'Daily scrapings' field is a progress bar with three segments: 'Safe' (green), 'Fast' (blue), and 'Max' (orange). The 'Max' segment is highlighted, and the text '1500 / 1500' is shown to the right. At the bottom left is a 'Reset to defaults' button with a circular arrow icon. At the bottom right are 'Cancel' and 'Save' buttons.

- **Withdrawals** → Here you can set the time to withdraw the sent connection request in case it is not accepted. You can also withdraw manually sent requests in bulk. After you have withdrawn a connection request, you will not be able to send it again to the same person for 3 weeks. In this same window you can also view the history of connections that have been withdrawn.

LinkedIn Settings



The screenshot shows the 'LinkedIn Settings' window with the 'Withdrawals' tab selected. It features a section titled 'Automatic Invitation Management' with an information icon. Below this is a checkbox labeled 'Automatically withdraw pending invitations' which is currently unchecked. To the right of the checkbox is an input field containing the number '7' followed by the text 'days'. Below this input field is a descriptive sentence: 'When enabled, invitations that have been pending for more than the specified number of days will be automatically withdrawn.' Below this section is a heading 'Pending connection requests' followed by the instruction 'Select the connection requests you wish to withdraw.' At the bottom, there is a light blue information box containing an information icon and the text: 'Once you withdraw a LinkedIn connection request, you won't be able to resend it to the same person for 3 weeks.'


Email


In the email section you will see three tabs:


- **Manage** → Where you will be able to connect one or several email addresses. The identity will use all of them to send Emails in the campaigns that are scheduled to send Emails. The lead load will be distributed among all the connected addresses. Note that if a lead starts with an address, and then that address is disconnected from the identity, another of the addresses that are still connected will not be used for that lead, but it will give an error and the only way to solve it will be to reconnect the email address with which the lead started.


Email Configuration

Manage Email rate Signature

 **Connect your email**
Integrate your email to start sending messages and managing campaigns effortlessly.
Choose your email provider:

 Sign in with Google

 Sign in with Microsoft

 Sign in with IMAP

Close





Once the first email address is connected you will be able to connect the others. In addition, you will then be able to see its status and whether it is connected or not. There is also a feature called *Warm-up* that basically trains the email address through an external provider in order to reduce *Spam* detection for that email address, i.e. increase its *deliverability*. This service costs 50€ and has an estimated duration of 3 weeks. If you decide to use it, you must pause all campaigns containing that email address and, therefore, that identity, and avoid sending emails from that address outside Genesy. That way the result of the Warm-up will be successful.

Email Configuration

[Manage](#)

[Email rate](#)

[Signature](#)

Email	Status	Warm-up ⓘ	Deliverability ⓘ
@gmail.com	• Connected	 Start	No data 
@genesy.ai	• Connected	 Start	No data 

+ Connect new email

Close


- **Email Rate** → Here you can configure the limit of Emails per day and per hour. The recommended to avoid going to *Spam* is 30 Emails per day and 5 per hour.

Email Configuration

[Manage](#)

[Email rate](#)

[Signature](#)

<p>Emails sent per inbox per day</p> <input type="text" value="30"/> <p>Recommended daily limit 30 or +30 per mailbox if you have a high demand domain reputation.</p> <p> Reset to defaults</p>	<p>Emails sent per inbox per hour</p> <input type="text" value="5"/> <p>Recommended hourly limit: 5 emails.</p>
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Close

Save

- **Signature** → Here you can configure the signature that the Emails sent by the identity will use.

Email Configuration

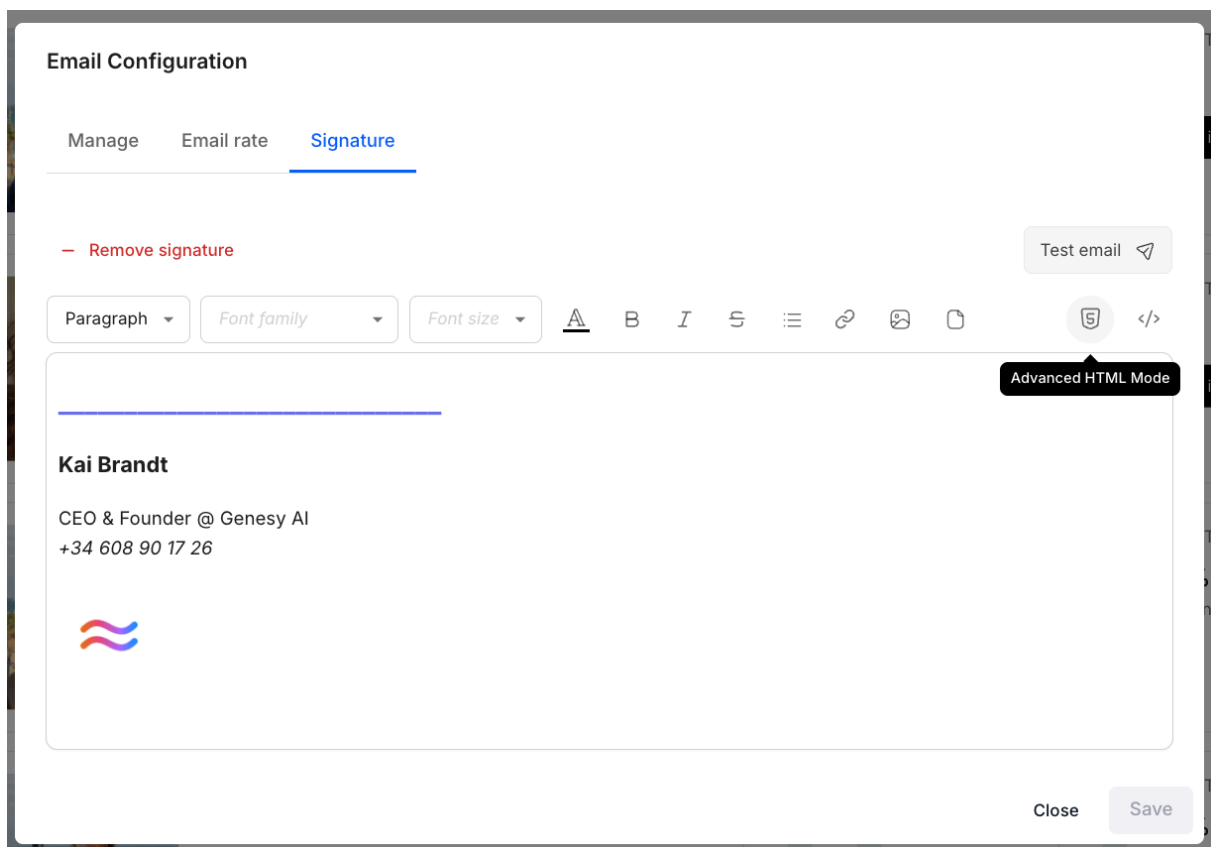
Manage Email rate **Signature**

 Add signature

Close

Save

If you wish, you can paste the HTML code directly from the advanced mode.



The screenshot shows the 'Email Configuration' window with the 'Signature' tab selected. The interface includes a 'Remove signature' link, a 'Test email' button, and a rich text editor toolbar with options for Paragraph, Font family, Font size, and various text formatting tools (underline, bold, italic, strikethrough, list, link, unlink, image, table). The signature content is displayed in a text area, showing the name 'Kai Brandt', title 'CEO & Founder @ Genesy AI', phone number '+34 608 90 17 26', and a logo. A tooltip labeled 'Advanced HTML Mode' points to the code icon in the toolbar. The bottom right corner features 'Close' and 'Save' buttons.


Share identity link

This button automatically copies a link to update the identity, which you can share with the person you want to configure their identity within Genesy


without having to have access to the platform. The link is valid for 24 hours.

Update Identity



Return to Genesys Platform



Kai Brandt
CEO & Founder at Genesys



Connections Status

	LinkedIn Connected	✔ Active	<button>Update</button>
	Email (google) Connected	✔ Active	<button>Update</button>