

AI Playbook

The **AI Playbook** is the central brain of your account. It houses the **Company Information**, **Personal Information** (identities), **AI Variables**, **AI Campaigns**, and **AI Conversation Tags**.

Each of these modules provides context to the Artificial Intelligence to ensure your campaigns, variables, and automated interactions are accurate and personalized.

Company Information

This section is used to give context to the AI (for variables or campaigns) and to set default filters (Saved profiles based on ICPs) for your searches.

General Details

You must detail the following core information :

- **Website**
- **LinkedIn URL**
- **Output Language**
- **Company Name**
- **Industry**
- **Number of Employees**
- **Headquarters Location**
- **Founding Year**
- **Company Overview:** A brief overview of the mission, vision, and unique selling points.

 **Fill with AI:** Click this button to activate a workflow that searches your Company Website and LinkedIn to automatically populate these fields.

Strategic Modules

Below the general details, you must fill in specific strategic modules to train the AI:

- Products & Services
- Product Name
- Product Description
- Value Proposition
- Price Range
- Ideal Customer Profile (ICP)
- Name
- Job Titles
- Locations
- Company Industry
- Company Size
- Revenue
- Key Pain Points
- Additional Information
- Disqualifying Factors
- Competitors
- Competitor Name
- Product Differentiator
- Testimonials
- Company Name
- Promoter Name
- Job Position
- Main Benefit
- FAQs
- Question
- Answer

Click **Update** at the bottom right to save changes.

Personal Information

This tab holds information related to the **Identities** connected to the account. This gives the AI context about *who* is sending the message.

First, select an identity from the dropdown menu. You can then fill in the following fields :

- **LinkedIn Profile**
- **Output Language**
- **First Name & Last Name**
- **Email & Phone Number**
- **Gender**
- **Languages**
- **Profile Overview**
- **Job Title & Seniority Level**
- **Key Responsibilities**
- **Schedule Meeting URL**
- **Educations**
- **Interests**

 **Fill with AI:** Use this button to automatically populate these fields using data from the selected Identity and their LinkedIn profile.

AI Variables

AI Variables are executable prompts that can be run on any Contact or Company to return a specific output (Text, Number, Date, or Tag). They are used to generate additional information columns in your lists.

Organization

- **Folders:** The left panel displays variables organized by **Contact** or **Company** types. You can add custom folders using the **+ Add folder** button.
- **Management:** On each variable card, click the three dots to **Edit**, **Duplicate**, **Clone to client** (for partners managing portfolios), or **Delete**. *Note: You cannot change a variable's name once created.*

Creating an AI Variable

Click **Create AI Variable** and select the entity type (**Contact** or **Company**).

Then configure the following :

- **Title:** Name of the variable.
- **Output:** Select the data type to be returned:
 - *Text* (String)
 - *Number* (Int or float)
 - *Date* (Numeric)
 - *One of* (Pre-defined tags)
- **Prompt:** Define the logic using this recommended structure:
 - *Persona:* Objective to be fulfilled.
 - *Context:* Information to generate relevant messages (context phrases, list fields, or other AI variables).
 - *Instructions/Guidelines:* Rules for structure, content, and tone.
 - *Examples:* Reference examples of the expected result.

Search Options (Optional)

You can enable external search capabilities to power your variable :

- **Google Search:** Analyzes the first 10 links found. *Tip: Be explicit in your prompt about what to search for.*
- **Google News:** Analyzes the first 10 news items found.
- **Website Search:** (Only for *Company* variables). Searches directly within a specific URL. You can assign a specific **Formula Field** or **Custom Field**

containing the URL. If left blank, it uses the default "Website" field from the table.

- *Constraint:* If Website Search is enabled, you cannot use Google Search or Google News at the same time.

Model & Cost

Select the AI Model (e.g., GPT-5, Grok-4, etc.).

- **Cost:** Costs vary by model and prompt complexity (tokens). If your prompt includes *other* nested AI variables, the cost of those implicit variables is added to the total .

AI Campaigns

This module manages the prompts used by the **AI Agent (Chatbot)**. If enabled in a campaign settings, this agent handles the conversation automatically once a lead replies.

To create a new agent, click **+ New campaign prompt** and define:

- **Name:** Name of the AI Campaign.
- **Prompt:** Follow the structure of **Persona** (Objective), **Context** (relevant info/variables), and **Instructions/Guidelines** (rules) .
- **GPT Model:** Select the model best suited for the interaction (e.g., GPT-5, Grok-4).

AI Conversation Tags

This module allows you to declare tags to label conversation replies. It includes **Auto tagging**, which analyzes the last message sent by a lead to automatically assign a tag.

Creating a Tag

Click **Create Tag** and configure :

- **Title:** Name of the tag.
- **Color:** Visual identifier.

- **Category:** Select **Neutral**, **Positive**, or **Negative**.
- **Instructions (Optional):** A prompt the AI uses to analyze the conversation and decide if the tag applies.
- **Auto tagging:** A toggle switch. If enabled, the system uses the instructions to apply the tag automatically. If disabled, the tag is for manual use only.

Managing Tags

- **Views:** Switch between **All** tags or **Active** tags (those with Auto tagging enabled).
- **Actions:** Use the icons on the tag list to **Delete**, **Duplicate/Edit**, or toggle the **Auto tagging** switch.