

# 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.

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## 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.

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## 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.

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## 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 .

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## 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).

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## 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.