

# AI Playbook Section

The **AI Playbook** is the section where our Company Information, connected identities or Personal Information, AI Variables, AI Campaigns and AI Conversation Tags modules are located. Each of them are in a separate tab.

, and to set default filters (Saved profiles based on the ICPs) in the searches for contacts and companies. The information to be detailed in this module is the following:

- **Company information**

- Website
- LinkedIn URL
- Output Language
- Company Name
- Industry
- Number of Employees
- Headquarters Location
- Founding Year
- Company Overview

|

There is also a 'Fill with AI' button that automatically populates the fields with the identity and LinkedIn information.

## AI Variables

This module contains all the AI variables, those that exist by default and are already in each account from the beginning, and those that you create as a user.

AI Variables are executable prompts for any Contact or Company, which return an output, which can be Text, Number, Date or One of (i.e. one of the tags we define). They are used to obtain additional information fields in our lists or tables.

|

Inside this module we see on the left a panel with all the AI Variables organized in folders. This panel has two tabs: one for the Contacts AI Variables and one for the Companies AI Variables.

With the '+ Add folder' button just below this panel we can add the folders that we believe convenient for our own organization.

And with the button at the top right 'Create AI Variable' we can create a new AI Variable . Clicking this button opens a window to select the type of entity to which the AI Variable we are creating is related: Contact or Company. It simply influences the organizational level in the sense of where it will be located: either within the Contacts tab or the Companies tab.

|

Once we choose whether it is one type or the other, the template opens with the fields to fill in, which are the following:

- **Title** → AI Variable name.
- **Output** → Type of output to be generated. It can be one of these:
  - Text → String type text.
  - Number → Number type int or float.
  - Date → Numeric date.
  - One of → Labels to be defined.
- **Prompt** → AI Variable prompt. It is recommended to follow a structure such as the following:
  - Person → Objective to be fulfilled.
  - Context → Information to generate relevant messages based on this information: context phrases, variables (which are fields in the lists) or even AI Variables.
  - Instructions/Guidelines → Rules to be followed when generating messages, both in terms of structure or content and linguistic.
  - Examples → Characteristic reference examples of the result we expect to obtain with the AI Variable.
- **Search (optional)** → Enablement used to extend the search to:
  - Google Search → Google search engine. Analyzes the first 10 links that appear searching for what is indicated within the prompt. If you do not specify what to search for via the browser, the AI interprets in its own way and performs the search it considers, but it is much more accurate if you explicitly indicate what to search for.

|

- **Google News** → Google News. It analyzes the first 10 news items that appear by searching for what is indicated within the prompt. As with Google Search, it works best if you explicitly state exactly what to search for.
- **Website Search** → Only available in the case of AI Company variables, but not in the case of contacts. This *search* searches directly within the URL containing the *Formula Field* or the *Custom Field* that we assign to it from the dropdown there. Or, in case of not assigning a Formula Field or Custom Field, the website of the *Website* field of the table will be used directly.

It is important to mention that it is optional to enable the Search, and that if Google Search is enabled you can also enable Google News and use both ways at the same time, but if Website Search is enabled only that one can be enabled, the other two cannot be enabled at the same time.



- **Folder** (optional) → The folder in which we want to save the AI Variable, depending on the organization we want.



Note that each model has an associated cost, and that in addition to the model can also increase the cost of the complexity of the prompt, which is measured according to internal technical criteria of the AI in relation to Tokens consumed by each prompt. In addition to that, if within the Variable IA prompt other Variable IAs are included, the cost of these implicit Variable IAs is added to the total cost of the Variable IA.

In the center of the module, all the AI Variables contained in each selected folder are displayed as cards. To the right of these cards there are three little dots, which if clicked open a small pop-up window that allow us to perform actions:

- **Edit** → Edit the variable. Although it is important to note that the name cannot be modified once it has been created, as it would cause problems in the campaigns.
- **Duplicate** → Duplicate the variable in order to take advantage of the content to recycle it and be more efficient.
- **Clone to client** → Clone it to another client. This applies in case you are a Genesy partner and manage a portfolio of clients.
- **Delete** → Delete the AI Variable.



## AI Campaigns

Here we also have prompts, but these are the ones that are used as chatbot if we enable the option in the campaign that the conversation continues with the AI once the lead has responded. This parameter is configured within *Campaigns*.



All these AI Campaign agents are listed in the left panel, and if we select any of these we can edit the prompt, change the AI model used and make an update to save the changes.



If we want to create a new AI Campaign we can do it from the '+ New campaign prompt' button located at the bottom of the left panel of this module. A new template will open in which we will have to define these fields:

- **Name** → AI Campaign name
- **Prompt** → The AI Campaign prompt. It is recommended to follow a structure such as the following:

- Person → Objective to be fulfilled or summarized notion of who he/she is as an AI agent.
- Context → Information to generate relevant messages, based on this information: context phrases, variables (which are fields in the lists) or even AI Variables.
- Instructions/Guidelines → Rules to be followed when generating messages, both in terms of structure or content and linguistic.
- **GPT model** → there are a variety of models to choose from, each one focusing better on some things than others.



## AI Conversation Tags

This other module allows us to declare Conversation Tags. These include the option of activating Auto tagging so that by means of an instruction they are set autonomously to the conversations, depending on the last message. In other words, each last message sent in a conversation with a lead is analyzed to determine which tag to add. This Auto tagging is dynamic.

By default, a few tags are created, some of which cannot be deleted. But you can deactivate them and only use the ones you want.

To create a Tag there is a button at the top right called 'Create Tag'. Clicking it opens a window with the template to create a new Tag. The fields to define are the following:

- **Title** → Tag name.
- **Color** → Visual color of the tag.
- **Category** → Category from among these three options it gives us to choose from:
  - Neutral
  - Positive
  - Negative
- **Instructions** (optional) → It is like a prompt, which the AI will use to analyze the conversations and decide whether to put that Tag, and so on for each Tag, so that if any of the instructions of the Tags makes sense with the conversation it will be put automatically.

However we can use that Tag manually, with the instruction disabled. To activate the Auto tagging is done with the toggle switch just below the text box.



In the center of this module we see as cards all the Tags that we have available in the account. To the right of each one there are two icons and a toggle switch: one is the trash can that serves to delete the Tag, the other is the overlapping squares that serves to duplicate and edit the Tag, and finally the toggle switch to enable or disable the Auto tagging, that is, to enable or disable the prompts (only in those Tags in which we have defined an instruction).



Finally, in the All tab of this module we see all the Tags, and in the Active tab only those that have an instruction and the Auto tagging is activated. There is also a search engine to search for Tags filtering by name.