QA Progress

Yellow = blocker to testing

Red = not working

Green = working

WebApp Specifications

1.1 Target Accounts - Target Accounts

1. Overview
    a. This view lets the user view and edit their Target Account list
    b. Each Target Account is linked to Account Intel and an Org Chart
2. Functionality
    a. Clicking one of the Target Accounts loads the Organizational Chart Builder view
3. Buttons
    a. Create new chart
        i. Allows the user to manually add a Target Account
    b. Bulk upload CSV
        i. Allows the user to upload a csv file of Target Accounts
    c. Generate Intel
        i. Allows the user to add Account Intel to the Target Account
        ii. Executes the prompt saved as the "Generate Intel Play" under AppSettings object (X) in Django, using Perplexity Deep Research.
        iii. The prompt is filled in, sent to the LLM and the contents are used to populate the Account Intel field.
    d. Bulk Generate Intel
        i. Runs the Generate Intel function for all selected accounts
        ii. Not able to select multiple accounts
    e. Edit
        i. Produces a popup window for the user to edit the fields tied to a Target Account
        ii. Fields available: Chart Name, Narrative, Account Intel, Website
    f. Delete
        i. Allows the user to delete a Target Account

1.2 Target Accounts - Organizational Chart Builder

1. Overview
    a. This view lets the user build/edit their Org Chart and all details tied to the Target Account.

2. Functionality
    a. When an account is loaded - we attempt to match the Target Account in Narrative to Companies in Hubspot. If there is a match then we pull all of the employees into the window to the left of the Org Chart.
    b. Drag employee to the Org Chart - lets the user build the org chart with Hubspot Contacts
    c. Navigate Org Chart
        i. Ctrl + Scroll to zoom
        ii. Shift + drag to pan
        iii. +100%- to zoom
    d. Edit Org Chart
        i. Move person
        ii. Change who person reports to
        iii. Delete person
3. Buttons
    a. Search Company
        i. Search Hubspot for the specified Company Name and Website to load employees
    b. Add People Manually
        i. Opens a panel to the right of the Org Chart, to add an employee manually
        ii. Required: First Name, Last Name, Job Title, Email
        iii. Optional: Hierarchy Level, Reports To
        iv. Click Add to Org Chart to add the employee
    c. Draft with AI
        i. Organizes the employees in the panel to the left of the Org Chart, using the prompt saved as Org Chart Structure Play under AppSettings Object (X) in Django.
        ii. The prompt is filled in, sent to the LLM and the contents are used to re-prioritize the Org Chart
    d. Update Chart
        i. Saves any changes to the Org Chart
    e. Clear Chart
        i. Removes all employees from the Org Chart
    f. Auto-Organize Chart
        i. Cleans up the spacing of the Org Chart

2. Messaging Plays

1. Overview
    a. This view allows the user to create, edit and save their Messaging Plays.
2. Functionality
    a. The default screen is blank with no play loaded

b. The user loads a play, specifies the LinkedIn profile that the play will be tested on, then runs the play which produces a messaging output.

3. Buttons
    a. **Fetch Data** executes the core functionality of the application
        i. Sends the LinkedIn profile to Coresignal for an Employee Endpoint Match and Company Enrichment match
        ii. Runs **Persona Detection -** uses the Job Title from the Coresignal match to match to one of the pre-saved Personas.
        iii. Runs **Hubspot Match** - uses the Company name (+website) from the Coresignal Company Enrichment endpoint to look for a matching ***Hubspot Contact*** in Hubspot. If a match is found, Nango will also return the Hubspot Company and the most recent ***Hubspot Dea***l tied to that Company.
        iv. Sends the results of the Coresignal match to Apify to hit two endpoints returning the LinkedIn posts for the User and the LinkedIn Job details listed for the Company
    b. Load play
        i. Opens a popup to select one of the previously selected plays
    c. Save as new play
        i. Saves the currently loaded play as a new play
    d. Clear play
        i. Refreshes to the default Messaging Plays screen
    e. Output variations count - dropdown
        i. Choose the number of outputs the play will generate, when run in the chrome extension
    f. Save output count
        i. Saves the selected output count
    g. Save Changes
        i. Saves the changes to the play
    h. Visible
        i. Determines if the play will be visible in the chrome extension
    i. Delete Play
        i. Deletes the play
    j. Show Compiled Instructions
        i. Provides a popup with the available variables loaded into the prompt template
    k. Model setting - dropdown
        i. Allows the user to specify the model and model provider that should be used for this prompt.
    l. Run Model
        i. Will run only the selected prompt in the chain
    m. Run all prompts

i. Will run the full chain of prompts

n. Add prompt to sequence
   i. Adds another prompt to the chain
o. Sequence Overview - drag and drop prompts
   i. Lets the user reorganize the order in which the prompts run
p. Select company variables
   i. Lets the user determine which of 3 value sets the play will be tested with
q. Garbage can emoji
   i. Deletes the prompt from the chain
r. Pencil (edit name)
   i. Edit the name of the prompt

3. Research Plays

1. Overview
   a. This view allows the user to create, edit and save their Research Plays.
2. Functionality
   a. The default screen is blank with no play loaded
   b. The user loads a play, specifies the LinkedIn profile that the play will be tested on, then runs the play which produces a research output.
3. Buttons
   a. **Fetch Data** executes the core functionality of the application
      i. Sends the LinkedIn profile to Coresignal for an Employee Endpoint Match and Company Enrichment match
      ii. Runs **Persona Detection -** uses the Job Title from the Coresignal match to match to one of the pre-saved Personas
         1. Completes and executes the prompt saved in Django AppSettings object (X): Persona detection play
      iii. Runs **Hubspot Match** - uses the Company name (+website?) from the Coresignal Company Enrichment endpoint to look for a matching ***Hubspot Contact*** in Hubspot. If a match is found, Nango will also return the Hubspot Company and the most recent ***Hubspot Dea***l tied to that Company.
      iv. Sends the results of the Coresignal match to Apify to hit two endpoints returning the LinkedIn posts for the User and the LinkedIn Job details listed for the Company
   b. Load Research
      i. Opens a popup to select one of the previously selected research plays
   c. Save as New Research
      i. Saves the currently loaded play as a new play
   d. Clear Research
      i. Refreshes to the default Research Plays screen

e. Batch 1, Batch 2, Batch 3, Batch 4, Batch 5
    i. Sets the batch that the research play will belong to, when research is retrieved in the chrome extension
f. Save Changes
    i. Saves the changes to the play
g. Visible
    i. Determines if the play will be visible in the chrome extension
h. Delete Play
    i. Deletes the play
i. Show Compiled Instructions
    i. Provides a popup with the available variables loaded into the prompt template
j. Model setting - dropdown
    i. Allows the user to specify the model and model provider that should be used for this prompt.
k. Run Model
    i. Will run only the selected prompt in the chain
l. Run all prompts
    i. Will run the full chain of prompts
m. Add prompt to sequence
    i. Adds another prompt to the chain
n. Sequence Overview - drag and drop prompts
    i. Lets the user reorganize the order in which the prompts run
o. Select company variables
    i. Lets the user determine which of 3 value sets the play will be tested with
p. Garbage can emoji
    i. Deletes the prompt from the chain
q. Pencil (edit name)
    i. Edit the name of the prompt

4. Analytics

1. Overview
    a. This view holds a table that shows all of the Plays in the user's Playbook
2. Functionality
    a. Details the model used, the required variables for each play and the required ***API data sources.***

5. Batch Management

1. Overview
    a. This view holds a table that shows each play's batch

2. Functionality
    a. Batch Management System
        i. We've built a batching system to manage the execution of the Research Plays in the chrome extension
            1. There are 5 endpoints we receive data from, dictating the time when the Research Play will be ready to run *(we can't execute all of the plays when they're ready because some plays are expected to have null values on execution.)*
                a. LinkedIn Profile - Coresignal Endpoint
                b. Company Enrichment - Coresignal Endpoint
                c. Hubspot Data (*tracks the final data delivery - Hubspot Deals)* - Nango Endpoint
                d. LinkedIn Posts - Apify Endpoint
                e. LinkedIn Jobs - Apify Endpoint
3. Buttons
    a. Auto-detect All Batches
        i. Maps the required data sources using the prompt contents
    b. Save All Mappings
        i. Saves all the auto-detected batches

6. Setup Company

1. Overview
    a. This view enables the Client to configure the platform for their users.
2. Functionality
    a. Company Values
        i. Default variables that are pre-set by Narrative
    b. Context Variables
        i. Company context outlines detail on the user's company
        ii. Competitor context outlines detail on how the user's company fits into the competitive landscape
    c. LinkedIn Research Configuration
        i. Job Titles to Search, Job Location and Max Job Postings are fields that configure the call to the Apify Jobs endpoint
    d. Custom Variables
        i. Variables set by the user's company, available for all Users at that company
    e. Setup Personas
        i. Personas are set by the user's company, and provide details on each of the buyer personas they're selling into.

        ii. The Chrome Extension and WebApp will attempt to match any researched lead to a Buyer Persona
            1. This uses the play defined as Persona detection play under AppSettings Object (X)
        iii. The Default Persona is used if the prospective lead cannot be matched to any of the listed Personas
        iv. *Personas must all have the same variables set
3. Buttons
    a. Expanding a cell produces a popup that enlarges the text.
    b. Save Company Settings
        i. Saves any changes to the table
    c. Add new Persona
        i. Adds a new Persona

7. Setup Profile

1. Overview
    a. Allows the user to set variables specific to only their account
2. Functionality
    a. Profile variables can be customized by the user
    b. Expanding a cell produces a popup enlarging the text.

8. Integrations

1. Overview
    a. Enables the user to setup their Hubspot Integration (via Nango)
2. Functionality
    a. Opens a window that allows the user to login to their Hubspot account
3. Buttons
    a. ?

9. Admin

1. Overview
    a. This view is reserved for users with Superadmin status = True, for Narrative Ai to support users
2. Functionality
    a. Dashboard
        i. Displays the # of users, plays, companies and groups
    b. User Management
        i. Manage privileges for each user
    c. Play Sharing

        i. Manage which plays are shared with each user
    d. Groups
        i. Not sure what this does
    e. Credits
        i. Add and subtract credits for each user
    f. Settings
        i. Company variables
            1. Add, edit and delete the default platform variables
        ii. Play editor
            1. Lets the Super Admin edit all plays from one place

3. **Narrative Credit system**
    a. Our Credit System ensures users do not consume more tokens than they pay for.
        i. Users purchase monthly credit allotments to use in the Narrative platform.
        ii. Each user's credit value is subtracted by the value of each action they take. Core costs include: AI model costs and Coresignal credit costs
            1. The ***Model credit costs*** page in django stores the values for the credit system.
    b. Rates
        i. 1 Narrative credit = $.50
            1. **$0.25 allocated to AI costs** (covers underlying model usage with 100% markup)
            2. **$0.25 profit margin** for Narrative
        ii. Calculate the model's Input Tokens per Credit and Output Tokens per Credit, using the Input Cost/1M Tokens and Output Cost/1M Tokens
            1. 250,000 / Cost/1M Tokens = Tokens per Credit
                a. Ex. GPT-5 Input Cost/1M Tokens = $1.25
                    i. 250,000/1.25 = ***200,000 Input Tokens per Credit***
                b. Ex. GPT-5 Output Cost/1M Tokens = $10
                    i. 250,000/10 = ***25,000 Output Tokens per Credit***

Chrome Extension Specifications

Does the chrome extension run the full chain of prompts?

1. Pre-Login

1. Overview
    a. Allows the user to sign into the Chrome Extension
    b. Users will be signed out every time the chrome extension is closed
2. Functionality

a. Prompts user to enter a Username and Password

3. Buttons
    a. Login

2. Research View

1. Overview
    a. This View allows the user to move from profile to profile while gathering data and processing research for the selected profile
2. Functionality
    a. The Research View allows the user to execute their entire Research Checklist for the selected lead
    b. The Extension works on a LinkedIn User profile, LinkedIn SalesNav User profile, or in Hubspot when a contact is loaded.
3. Buttons
    a. **Run** button
        i. Executes the full Research Checklist
            1. **Raw data** API calls
                a. Match profile in Coresignal
                    i. Profile endpoint
                    ii. Company enrichment endpoint
                b. Use Coresignal data for Hubspot match using Nango
                c. Use Coresignal data for Apify match
            2. **Persona Match**
                a. Completes and executes the prompt saved in Django AppSettings object (X): Persona detection play
            3. **Target Account** match
                a. Use Coresignal data for Account Intel match
            4. **Batch System** manages the execution of the Research Plays
            5. **Research Plays** run
                a. Each research play runs all prompts in the chain through TrueFoundry and displays the results that come back as anything but: “nothing”, “Nothing” etc,.
    b. **Stop** button
        i. Validate the same process happens when Auto-run is turned on, as when Run is selected
    c. **Auto-run** button
        i. Validate the same process happens when Auto-run is turned on, as when Run is selected
    d. **Account Intel** badge
        i. This badge correctly displays the Account Intel tied to the Target Account that the prospect’s profile was matched to

e. **Information** badge
    i. Correctly displays all of the Run Button results for the user to debug if needed
f. **Logout** button
    i. Logs the user out of their profile and brings them back to the login screen
g. **Output Count** dropdown
    i. This selection should determine the number of outputs that are generated by Messaging Plays
h. **Play Selection** drop down
    i. Green Plays
        1. **These are available for execution and trigger Messaging Plays** execution
            a. Play outputs ***X*** number of results based on the Output Count chosen
            b. All Raw Data and Research is available to create Messaging plays
    ii. Red Plays - form fill
        1. All fields disappear except for the remaining values required to run the **Messaging Play**
        2. User is able to enter their values into each field
        3. The messaging play runs using the newly specified values

3. Messaging Output

1. Overview
    a. This screen shows Users the output of their Messaging Play
2. Functionality
    a. The user is presented with their Messaging Play outputs
3. Buttons
    a. They are able to copy and paste the contents using the copy pages button

Django Specifications

1. Admin privileges

Define Super Admin privileges for the platform

2. App settings

Where Admin Plays are defined

3. Companies

Add, edit and delete companies

4. LinkedIn profiles

History of the LinkedIn profiles researched in the platform

5. Llm models

Define the LLM models that can be used by users.

6. Llm responses

History of all LLM outputs in the platform

7. Llm statistics

Details of each LLM call

8. Model credit costs

Edits the values used in the Narrative Credit system

9. Org charts

Stores all Org Charts and their details

10. Play permissions

Stores all plays and their permissions

11. Play share group members

? not sure

12. Play share groups

? not sure

13. Play shares

? not sure

14. Plays

Store all of the plays

15. Profiles

Tracks all of the Profile variables created by users

16. Token transaction logs

Credit system - ? not sure

17. User credit accounts

Credit system - ? not sure

18. User play preferences

? not sure