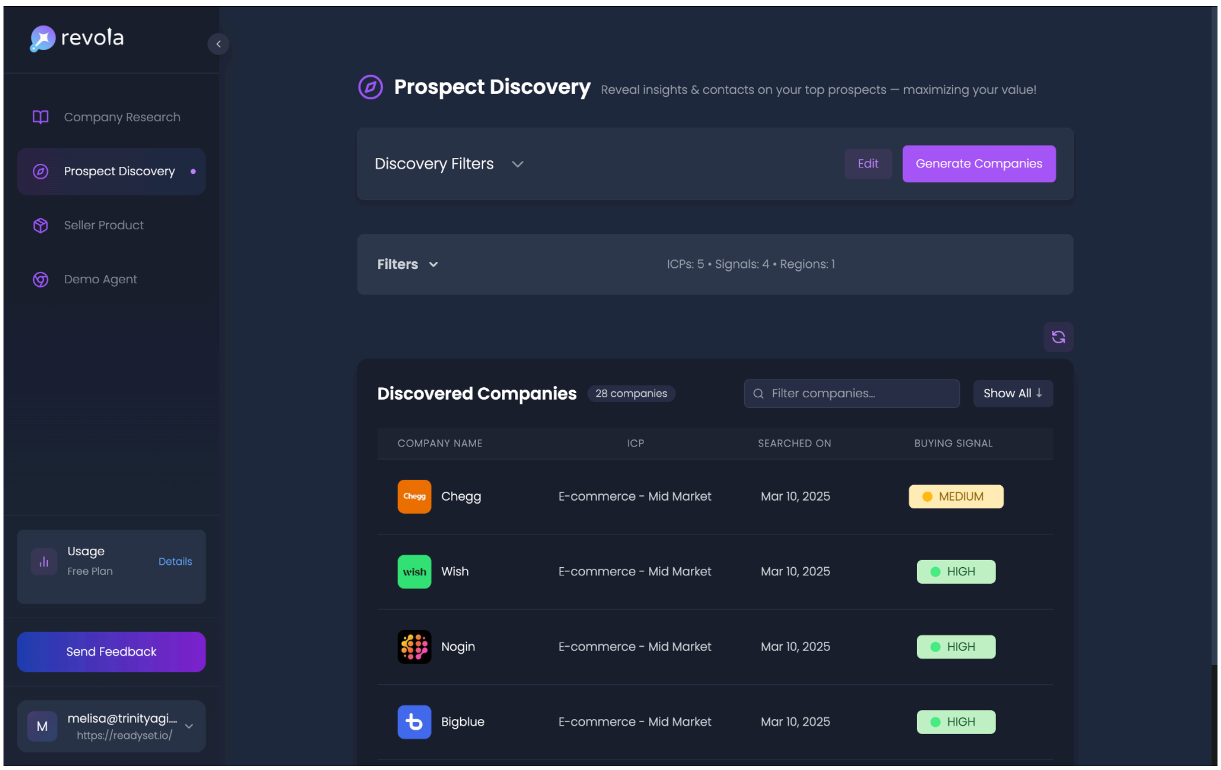
Revola AI: How-To Guide

A Step-by-Step Guide to Setting Up and Using Revola AI

1. How to Log In to Revola AI



Overview

Revola AI uses passwordless authentication, meaning you do not need to remember a password. Instead, a one-time authentication code is sent to your registered email each time you log in.

Prerequisites

- A registered business email address used during sign-up
- Access to your email inbox to receive the login code

Step-by-Step Guide

1. Visit the Revola AI App Login Page

- Open your browser and go to the Revola AI official website.
- Click on the "Log In" button at the top right corner.

2. Enter Your Registered Email

- Type in the email address you used during sign-up.
- Click “Continue” to proceed.

3. Enter the One-Time Authentication Code

- Check your email for a 8-digit authentication code sent by Revola AI.
- Enter the code on the login page and click “Verify”.

4. Access Your Dashboard

- Once the code is verified, you will be redirected to your Revola AI dashboard.
- From here, you can begin using features such as prospect discovery, campaign setup, and demo deployment.

Troubleshooting & FAQs

Did not receive the authentication code?

- Check your spam or junk folder.
- If the email does not arrive within a few minutes, click “Resend Code” to generate a new one.

Entered the wrong email?

- Go back to the login page and enter the correct email address.

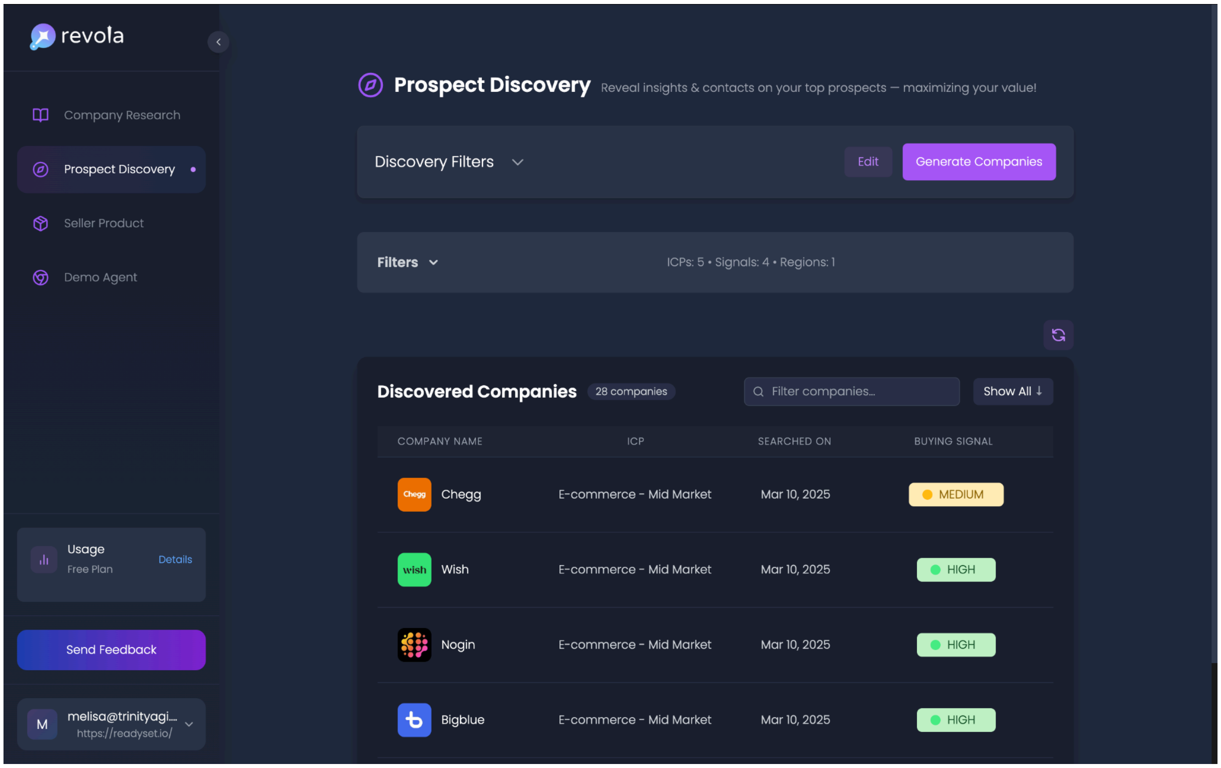
Authentication code expired?

- Authentication codes are valid for a limited time. If yours expires, request a new code by clicking “Resend Code”.

2. How to Sign Up for Revola AI

Overview

Signing up for **Revola AI** is the first step toward automating your sales and marketing processes. This guide walks you through the signup process and account setup in a few simple steps.



Prerequisites

Before you begin, ensure you have:

- A **business email address** (Gmail, Outlook, or company domain recommended)
- Basic company details, including **company name, industry, and website**

Step-by-Step Guide

1. Visit the Revola AI Signup Page

- Open your web browser and go to the Revola AI official website.
- Click on the "Log-In" button at the top right corner of the homepage.
- Click “Sign in Securely" button
- Then click on “Create an account” link below the Next button

2. Enter Your Details

- Fill in your business email address and password.
- Click “Sign up” to proceed.

3. Passwordless Authentication

- You will receive a one-time authentication code at your registered email address.
- Open your email inbox, find the code, and enter it on the Revola AI login page.

4. Access Your Dashboard

- After completing the setup, you will be redirected to the Revola App dashboard.
- From here, you can start exploring features, configuring seller context, discovering prospects, and setting up campaigns.

Troubleshooting & FAQs

Did not receive the authentication code?

- Check your spam or junk folder.
- If you still do not see the email, click “Resend Code” on the login page.

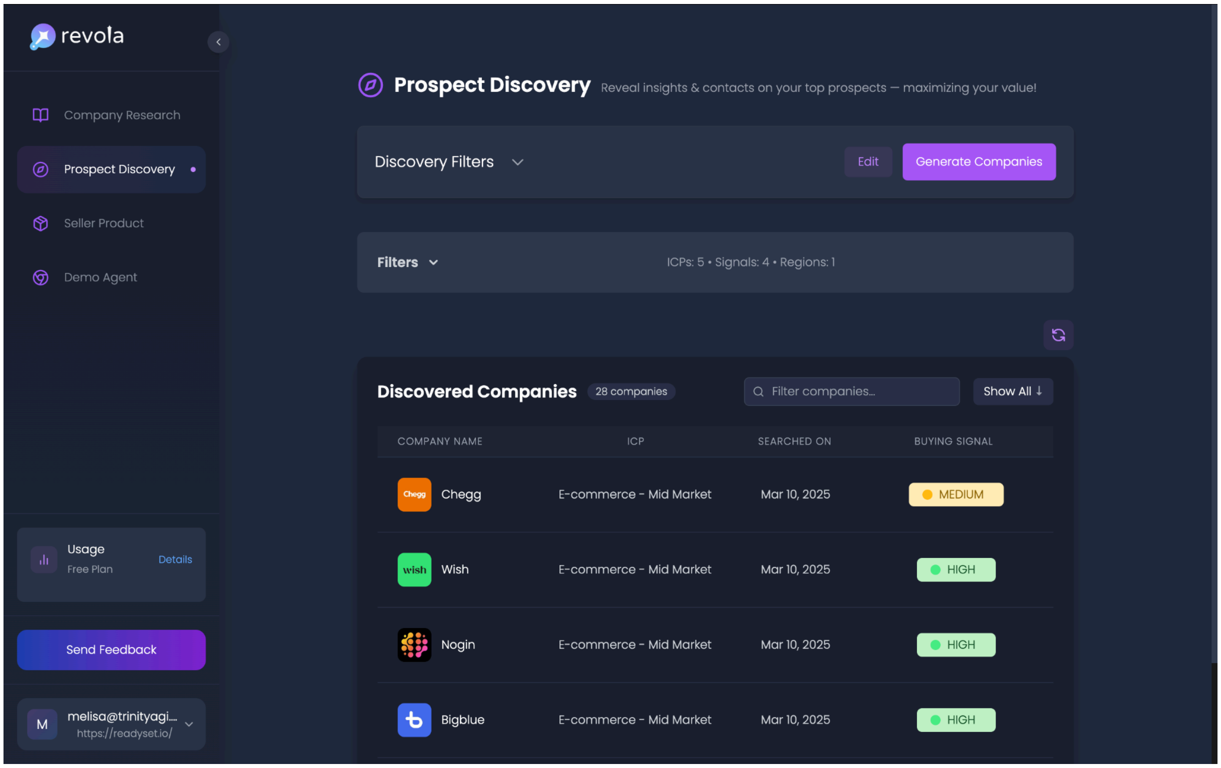
Entered the wrong email during signup?

- Go back to the signup page and enter the correct email address.

Forgot your login details?

- Since Revola AI uses passwordless authentication, you do not need a password. Simply enter your registered email, and a new code will be sent to you.

3. How to Add Seller Context



Overview

The Seller Context is essential for setting up your product details within Revola AI. It enables the system to understand your business, products, and target audience by analyzing your website. Once configured, this information is used for prospecting, contact discovery, and campaign personalization.

Prerequisites

- A valid **URL** of your product website

Step-by-Step Guide

1. Provide Your Product Website URL

- Navigate to the Seller Context section in your Revola AI dashboard.
- Enter the URL of your product website in the designated field.
- Click “Analyze” to begin the process.

2. Automatic Data Gathering

- The system will crawl your website and collect relevant information about your company, products, and use cases.
- This process may take up to 2 minutes.
- Once the analysis is complete, your company logo will appear at the top-right corner of the dashboard, indicating successful setup.

3. Understanding the Seller Context Sections

After the analysis, you will see four main sections:

1. Company Context

    - Business Summary – A brief description of your company. If the information is incorrect, contact Revola AI Support.
    - Products – A list of products detected from your website.
    - Use Cases – Various use cases where your product can be applied.

2. ICP (Ideal Customer Profile) Profile

    - This section is critical as it determines how prospects and contacts are identified.
    - ICPs are editable, and new profiles can be added or removed.
    - The most important fields include:
        - ICP Name – Used to identify relevant companies. It is a combination of industry segment and company size.
        - Decision Makers & Users – Key roles that will be targeted within companies for outreach.

3. Prospect Email Settings

    - These settings control how emails and landing pages are auto-generated for prospects.
    - You can adjust the email tone and add special instructions, such as:
        - Including a meeting scheduling link
        - Customizing the message for a more personalized outreach

4. Documents and Use Cases

    - A list of reference materials and documents related to your product.
    - These documents are essential as they will be referenced when reaching out to prospects.

Troubleshooting & FAQs

My company logo is not appearing after analysis. What should I do?

- Wait a few minutes and refresh the page.
- Ensure the provided URL is correct and publicly accessible.
- If the issue persists, try again by providing https://www.app.revola.ai/set-contact.

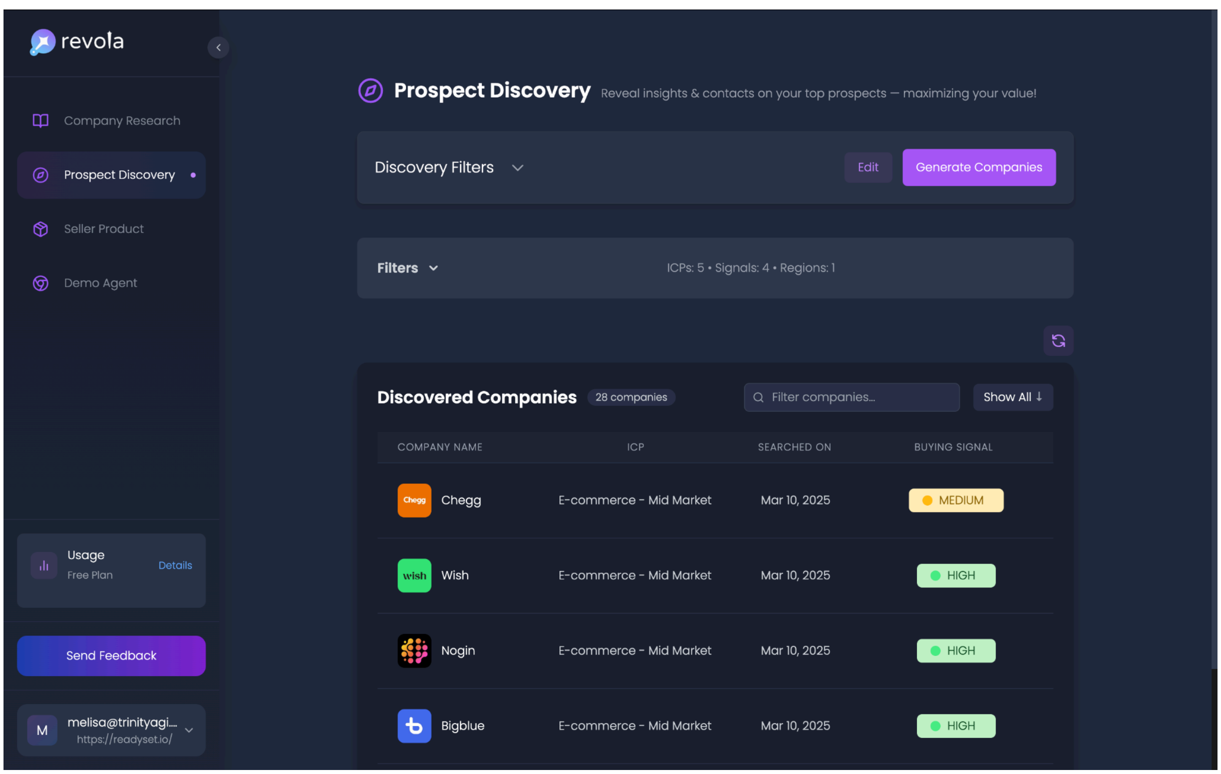
Some of the detected information is incorrect. How can I fix it?

- If the business summary is incorrect, reach out to support.
- You can edit ICP profiles directly from the dashboard.
- Adjust prospect email settings to ensure personalized outreach.

Can I add more products or use cases manually?

- No you can’t add more products and use cases. Contact Support.

4. How to Discover Prospects



Overview

The Discover Prospects feature automatically identifies potential customers that match your Ideal Customer Profile (ICP), based on key buying signals and geographical regions. This allows you to focus on high-intent leads who are more likely to engage with your product.

Prerequisites

- You must have an active subscription.
- During the trial period, you can:
  - Discover up to 30 prospects.
  - Perform 5 deep prospect research requests.
- If you have a single-unit subscription, you can:
  - Discover up to 300 prospects.
  - Perform 50 deep prospect research requests.
- If you have exceeded your discovery or research limits, you will need to upgrade your plan to continue using the feature.

How It Works

Revola AI scans a predefined ICP cohort from the Seller Context, looking for companies that show specific buying signals in a given region. The following signals indicate whether a prospect might be ready to buy:

- Hiring Activity – The company is expanding its team, potentially requiring new tools or services.
- Blog Mentions – The company has recently written about a related topic, indicating interest.
- News Mentions – The company has been mentioned in news articles relevant to your industry.
- Funding Announcements – A recent funding round suggests the company may have the budget for new purchases.

Users can filter prospects by selecting specific ICPs, regions, and buying signals.

Step-by-Step Guide

1. Navigate to the Discover Prospects Section

- Go to the Discover Prospects left nav from your Revola AI dashboard.

2. Adjust Filtering Criteria (Optional)

- Click the "Edit" button to modify:
  - ICP Cohort (Predefined from Seller Context)

    - Region (Geographical area of operation)
    - Buying Signals (Hiring, Blog, News, Funding)
- Once the changes are made, click "Save" to apply the new filters.

3. Start Discovering Prospects

- Click the "Discover Prospects" button to begin the search.
- The system will start identifying prospects that meet the selected criteria.
- It takes approximately one minute to find 10 prospects.

4. Review Discovered Prospects

- Once the discovery process is complete, prospects will appear in the list below.
- Review the prospects to determine their relevance.

5. Conduct Deep Research on a Prospect

- If a prospect looks promising, click the "Do Deep Research" button next to their name.
- Deep research takes up to a few minutes per prospect to complete.
- Once complete, the row will become clickable, allowing you to view detailed company insights.

Troubleshooting & FAQs

I don't see any prospects after running a search. What should I do?

- Ensure your ICP profile is well-defined in Seller Context.
- Try selecting different buying signals or regions.
- Check if you have exceeded your discovery or research limits.
- If the issue persists, refresh the page and try again.

How long does deep research take?

- Deep research typically takes a few minutes per prospect, depending on data availability.

Can I change filters after starting a search?

- Yes, click "Edit" to modify filters before running a new discovery.

What happens after I discover a prospect?

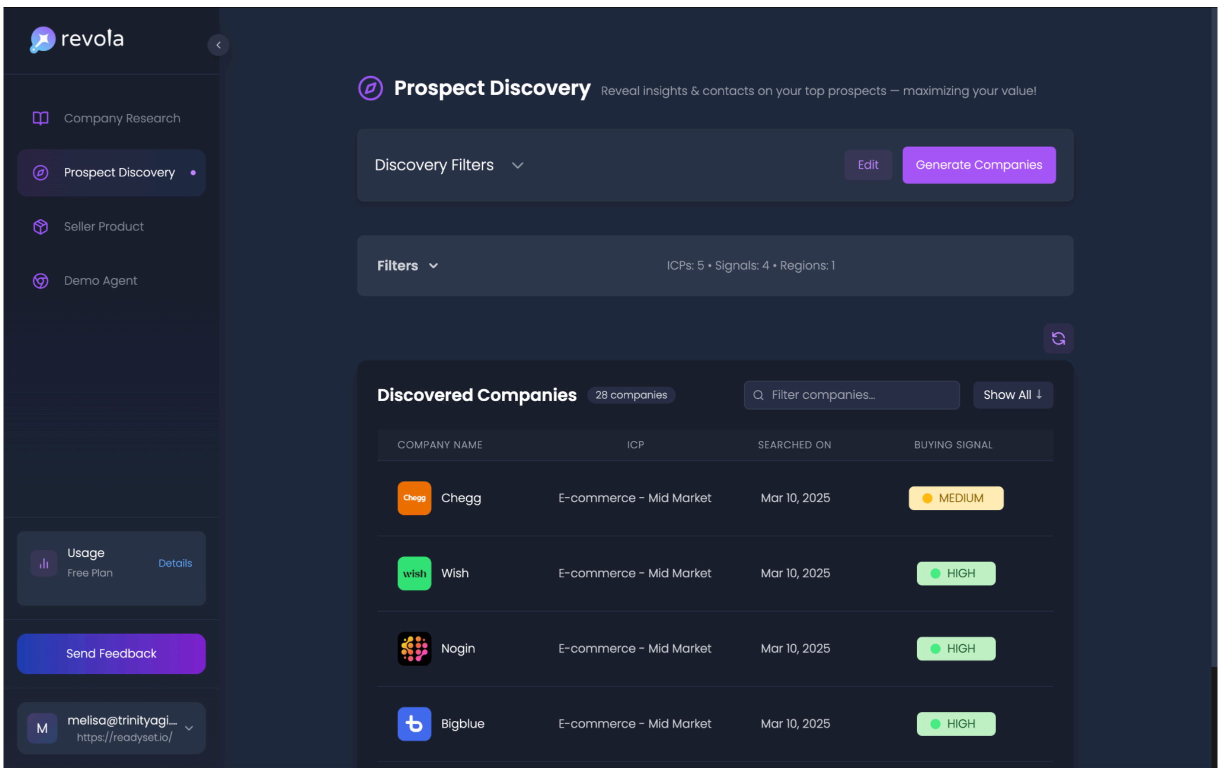
- You can initiate deep research for a more detailed analysis.
- Once deep research is complete, you can review the company profile, decision-makers, and key insights.

What happens if I reach my discovery or research limit?

- You will be notified if you have exhausted your allotted prospect discoveries or deep research requests.
- To continue using the feature, you will need to buy one more credit.

Here's the **"How to Do Company Research"** section in a structured and user-friendly format:

5. How to Do Company Research



Overview

The Company Research feature provides deep insights into a target company by analyzing its size, market activity, leadership signals, and potential buying intent. This enables more personalized outreach and strategic engagement.

Prerequisites

- A valid company website URL for research
- An active subscription with available deep research credits
- If you are on a trial plan, you can conduct up to 5 deep company research requests

Step-by-Step Guide

1. Navigate to the Company Research Section

- Open the Company Research tab in your Revola AI dashboard.
- Click "Research a Company" to begin.

2. Enter Company Details

- Input the URL of the company you want to research.
- Click “Research Company” to trigger the process.

3. Automated Research Process

- The system will analyze the company’s data, which may take a few minutes to complete.
- Once the research is done, the company will appear as a new entry in your research list.

4. Viewing Research Results

- Click on the company row to open the detailed research results.

Understanding the Company Research Interface

The Company Research section consists of a **left panel** and a **right panel** with multiple tabs.

Left Panel: Company Overview & Contact Insights

1. Company Details
    - Location
    - Number of employees
    - Annual revenue
    - IT spending estimates
2. ICP-Based Contact List
    - List of contacts based on the Ideal Customer Profile (ICP) and user definitions.
    - For each contact, there are buttons to:

        - Generate a personalized email
        - Create a LinkedIn message
        - Generate a targeted landing page
    - You can also manually add a contact, and the system will automatically generate relevant messaging for that individual.

Right Panel: Research Insights (Tabs)

1. Company Information

- A summary of what the company does.
- List of adjacent products the company uses.
- Links to data sources for deeper validation.

2. Organizational Signals

- Leadership changes (new executive hires or departures).
- Funding signals (recent investments or funding rounds).

3. Market Signals

- Mergers & Acquisitions (M&A) and Partnerships.
- New job postings that may indicate expansion or a shift in focus.
- Relevant tech initiatives that align with your offering.

4. News & Activities

- Recent news related to the company.
- Industry trends and notable activities.

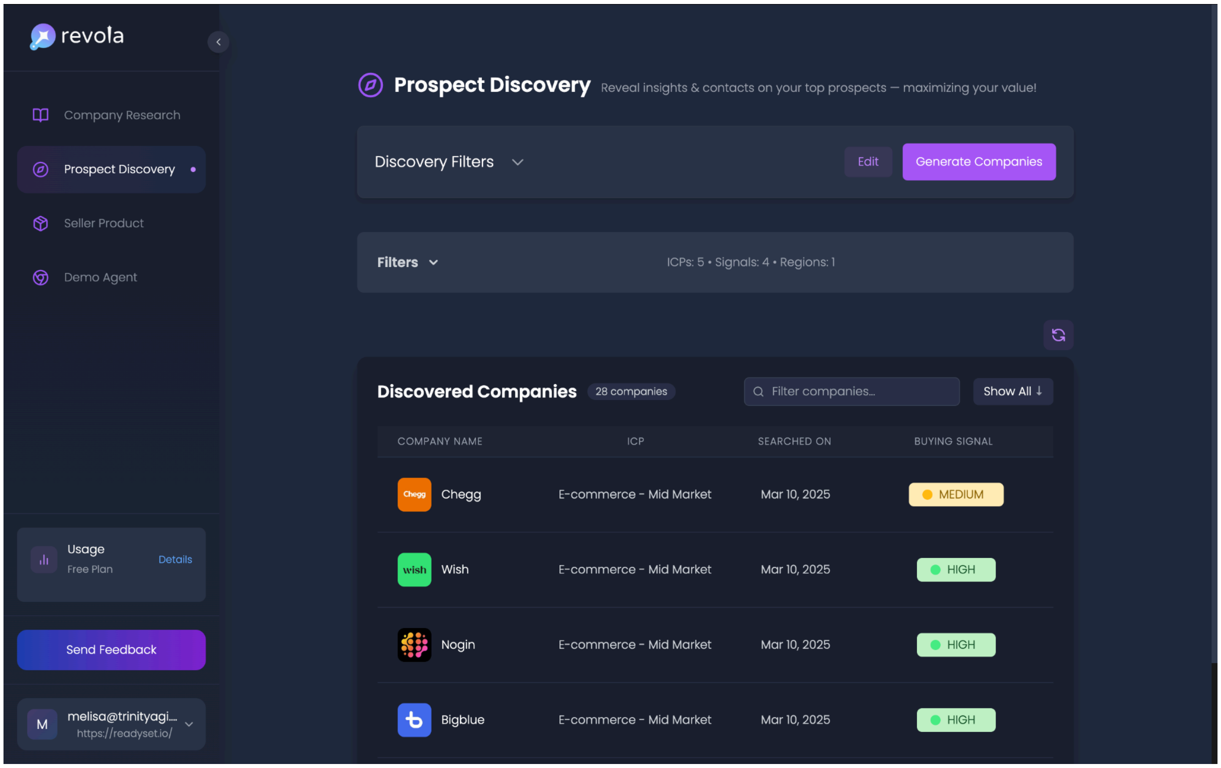
5. Objections & Responses

- Anticipated objections the company might have about your product.
- Pre-prepared response strategies to address objections effectively.

6. Case Studies

- A collection of relevant case studies showcasing similar businesses that benefited from your product.

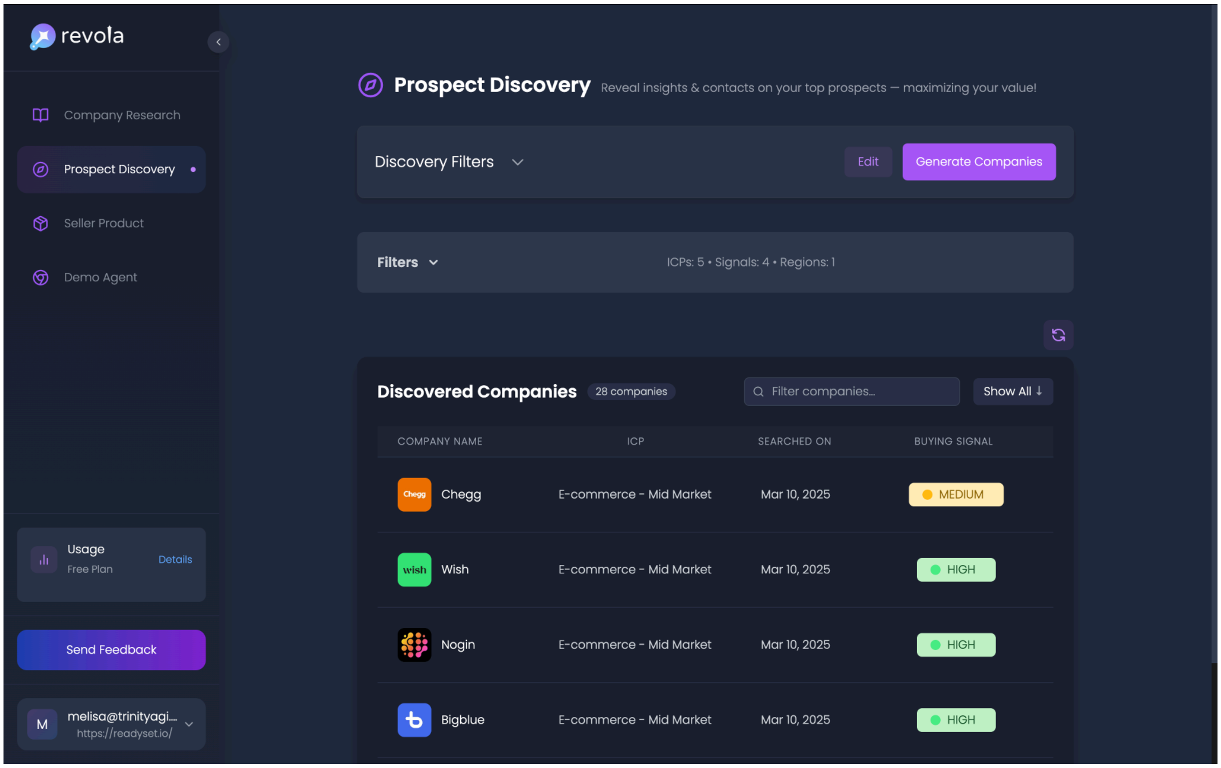
Troubleshooting & FAQs



I don’t see research results after submitting a company. What should I do?

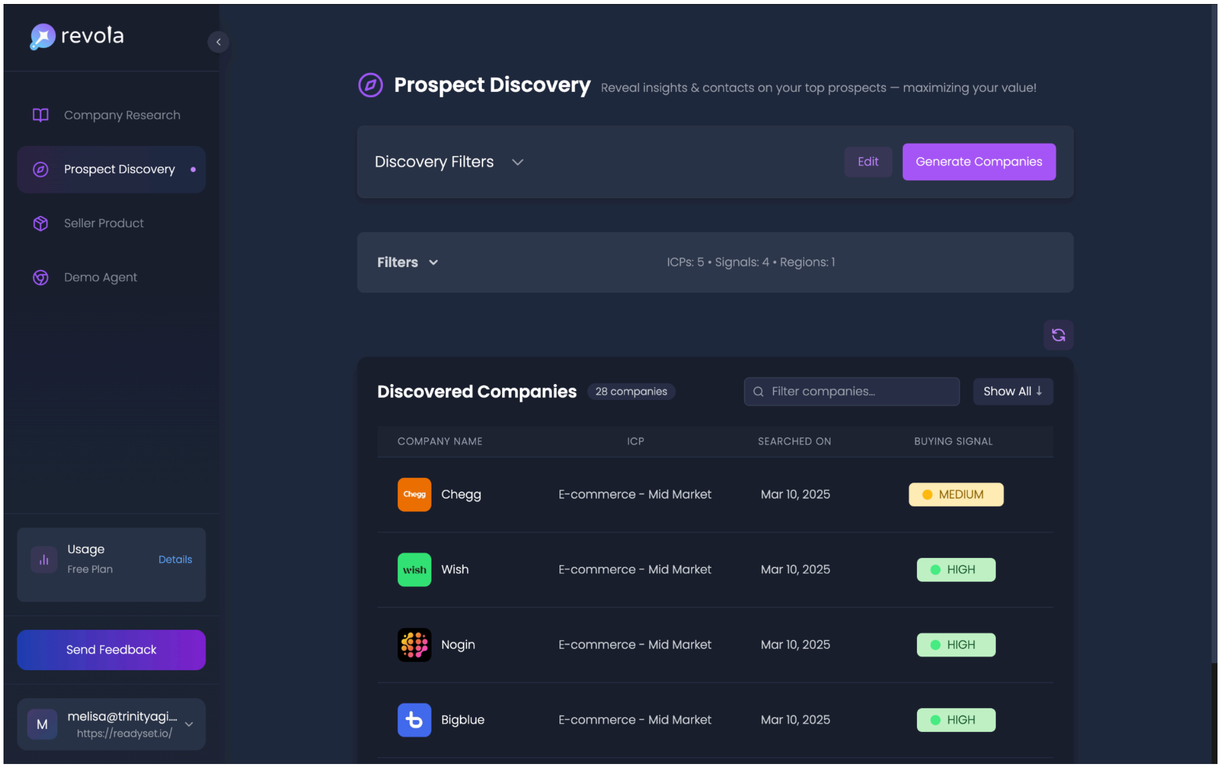
- Wait a few minutes and refresh the page.
- Ensure the company website URL is valid and publicly accessible.
- Check if you have exceeded your deep research limit.

Can I edit or add more contacts manually?



- Yes, you can add new contacts to the contact list, and Revola AI will automatically generate relevant outreach messages.

How can I use the generated insights?



- Use the company insights to personalize emails, LinkedIn messages, and landing pages.
- Leverage organizational and market signals to reach out at the right time with relevant messaging.

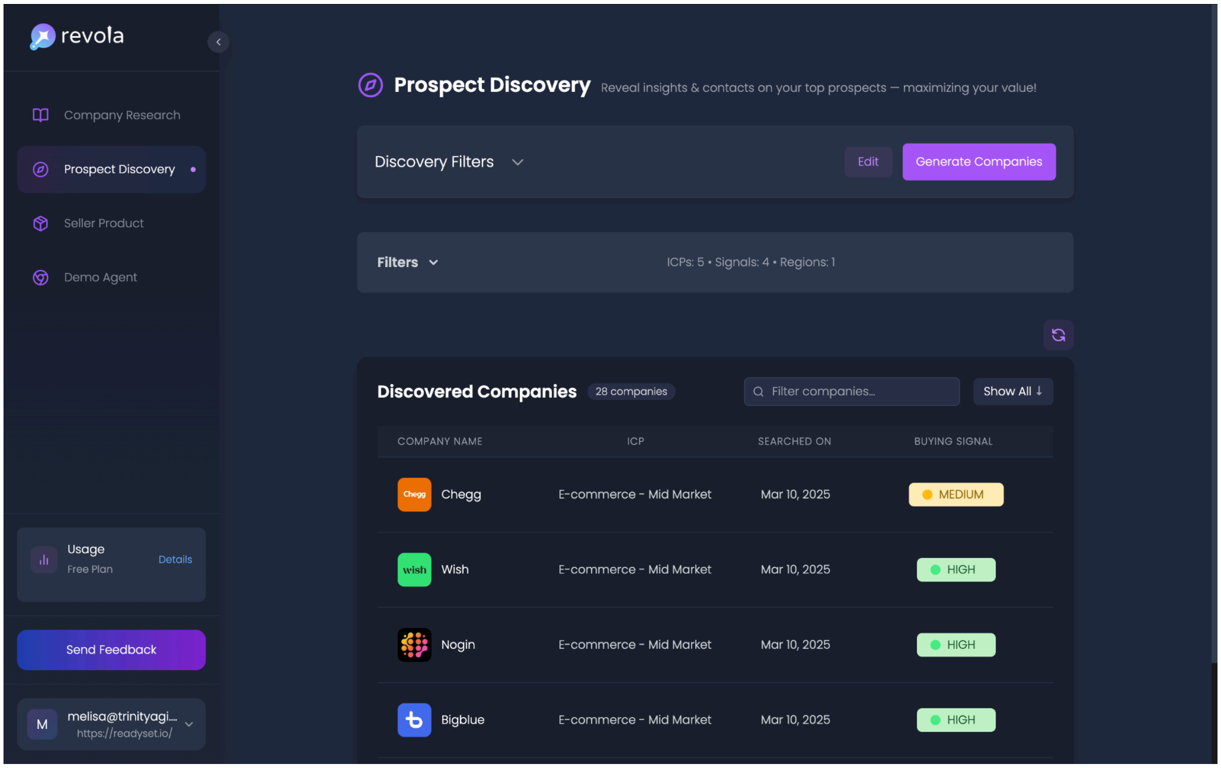
What if my subscription limit is reached?

- You will receive a notification when you reach your deep research limit.
- To continue researching more companies, you will need to upgrade your subscription.

Here’s the **"How to Generate Personalized Messages"** section in a structured format:

6. How to Generate Personalized Messages

Overview



Revola AI allows you to generate AI-powered personalized messages for outreach, tailored to each prospect based on real-time research. The system creates three types of messages:

- Email
- LinkedIn Message
- Landing Web Page (Automatically embedded in emails and LinkedIn messages)

Personalization is automatically handled by AI, leveraging data from the prospect's research. This ensures that outreach messages are highly relevant, engaging, and conversion-focused.

Prerequisites

- A researched prospect (via Discover Prospects or Company Research)
- A configured Seller Context with a defined email tone
- An active subscription with available outreach message credits

Step-by-Step Guide

1. Navigate to the Prospect or Company Profile

- Go to the Discover Prospects or Company Research section.
- Select a prospect or company from the list.

2. Generate a Personalized Message

- Click on the "Generate Personalized Message" button.
- Choose the type of message:
    - Email
    - LinkedIn Message
    - Landing Page (Generated automatically and embedded in messages)

3. AI-Powered Personalization

- The AI system automatically personalizes the message based on the prospect’s:
    - Industry and role
    - Company insights
    - Recent buying signals (funding, hiring, news, etc.)
- The AI also embeds the generated landing page inside the email or LinkedIn message.

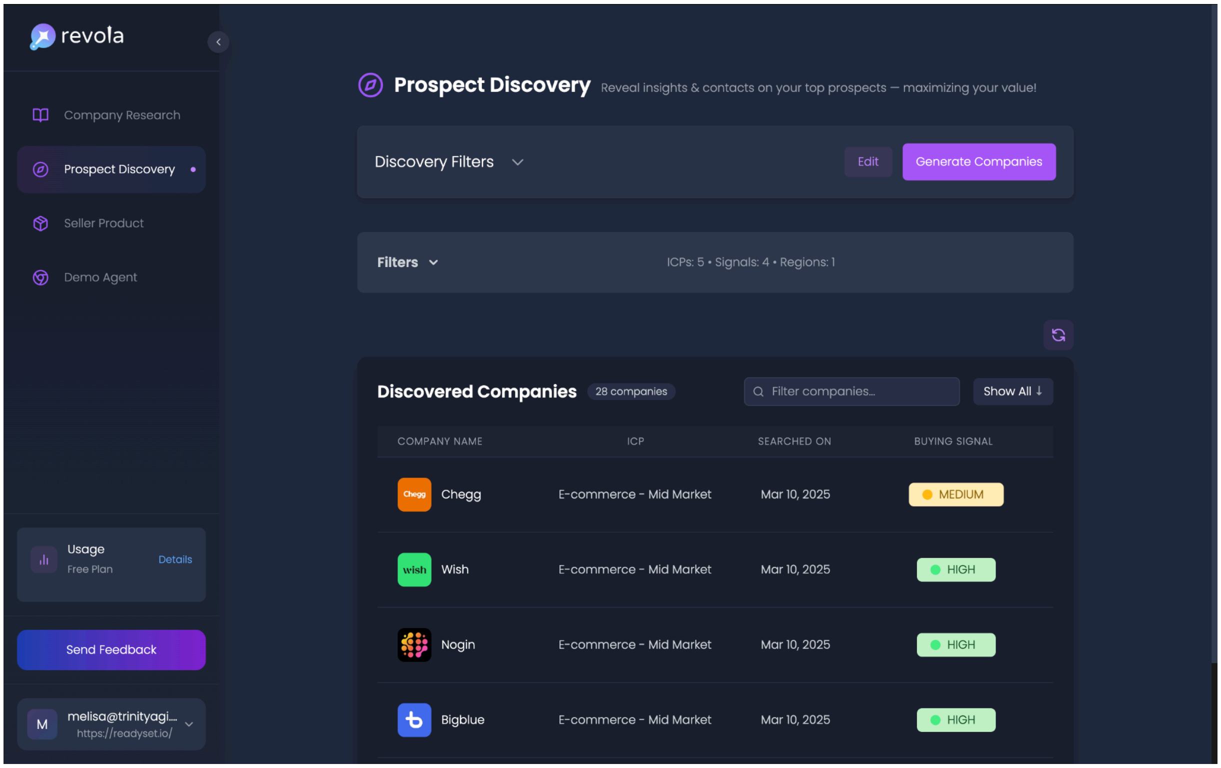
4. Adjust Tone and Customize Messaging (Optional)

- The email tone is set in the Seller Context and can be adjusted to match your brand’s voice (e.g., professional, friendly, persuasive).
- You can add special instructions, such as:
    - Including a calendar scheduling link for easy meeting booking
    - Highlighting a specific product feature relevant to the prospect

5. Review and Send

- Review the AI-generated message.
- If needed, make manual edits for further customization.
- Click “Send” (for emails or LinkedIn messages) or “Copy Message” if sending manually.

Troubleshooting & FAQs



How can I change the tone of the messages?

- Go to Seller Context and update the email tone settings.

Can I edit the generated message before sending it?

- Yes, messages can be manually adjusted before being sent.

What happens if I don't provide special instructions?

- The AI system will generate a default outreach message based on the prospect's profile and buying signals.

Why is the landing page important?

- The landing page provides a personalized experience for the prospect, reinforcing the message and increasing engagement.

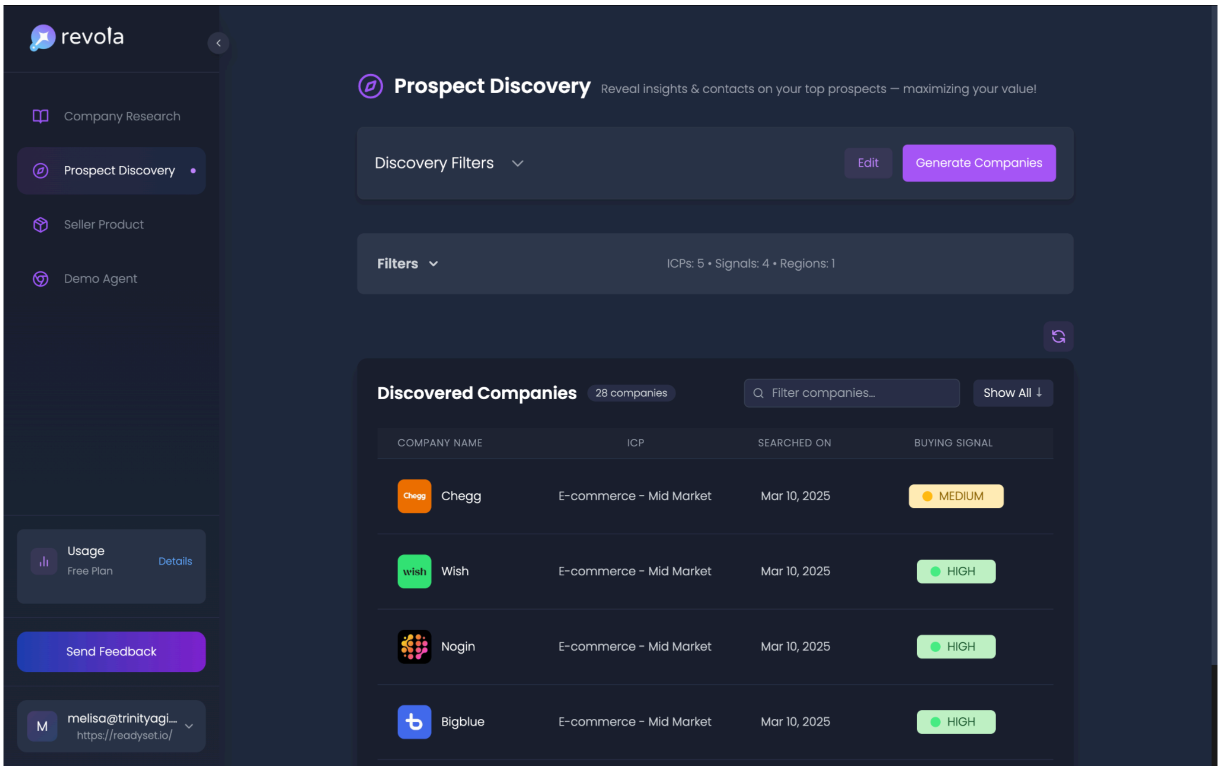
Do I need to generate a separate landing page?

- No, Revola AI automatically creates and embeds a unique landing page within the email or LinkedIn message.

Can I track the performance of these messages?

- Yes, performance tracking is available within the Campaigns section.

7. How to Buy a Subscription



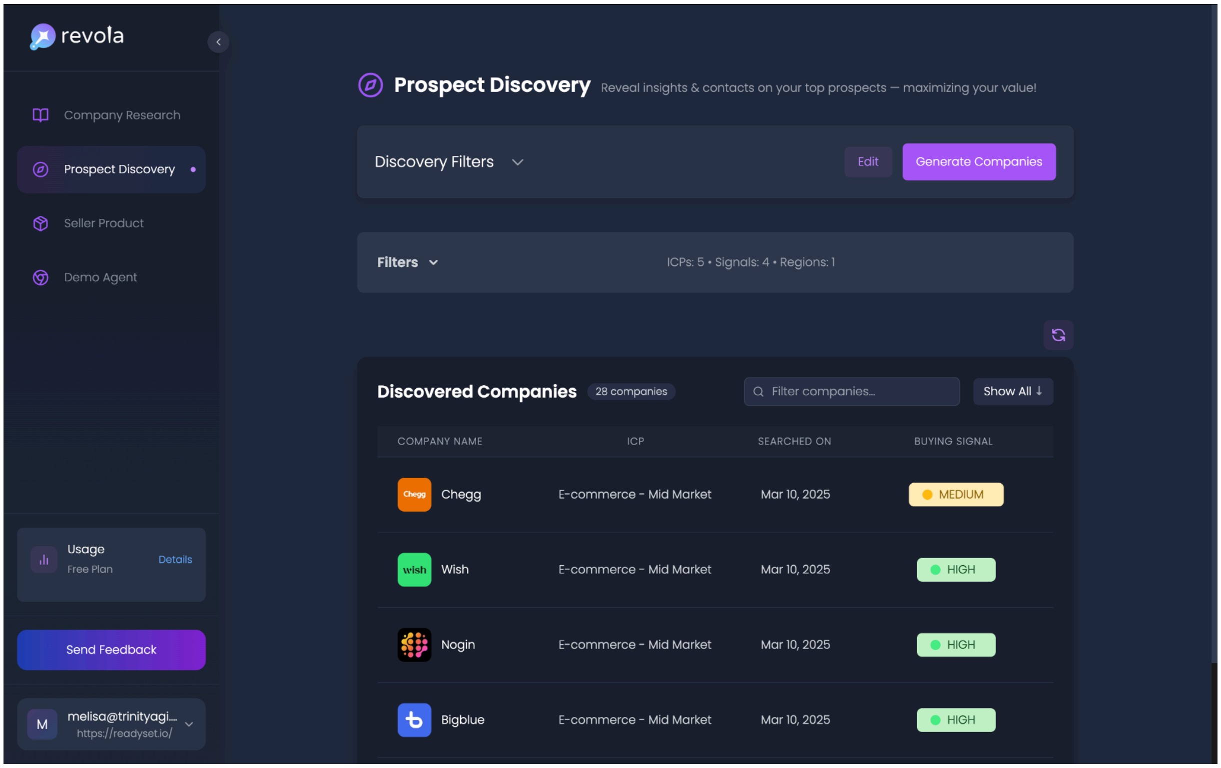
Overview

To use Revola AI beyond the trial limits, you need to purchase a subscription. The billing system is designed to be flexible, allowing you to adjust your quota based on your prospecting and research needs.

Prerequisites

- A valid payment method
- An active Revola AI account

Step-by-Step Guide



1. Access the Billing Section

- Click on your name at the bottom-left corner of the dashboard.
- Select "Billing" from the menu.

2. View Your Current Subscription

- The Billing Section will show:
  - Your current subscription status
  - Your billing cycle
  - The next renewal date

3. Purchase a Subscription

- By default, a new subscription includes:
  - 50 deep research requests
  - 300 prospect discoveries
- If you need more, increase the quantity in increments of 1.
  - Each increment adds 50 deep research and 300 discoveries.
  - The minimum quantity allowed is 1.

- Click "Confirm Purchase" to proceed with the payment.

4. Understanding Billing & Renewals

- Your subscription renews automatically every month.
- The payment is deducted 7 days before your subscription expires to ensure uninterrupted access.
- Once purchased, the subscription remains active until the next billing cycle anniversary.

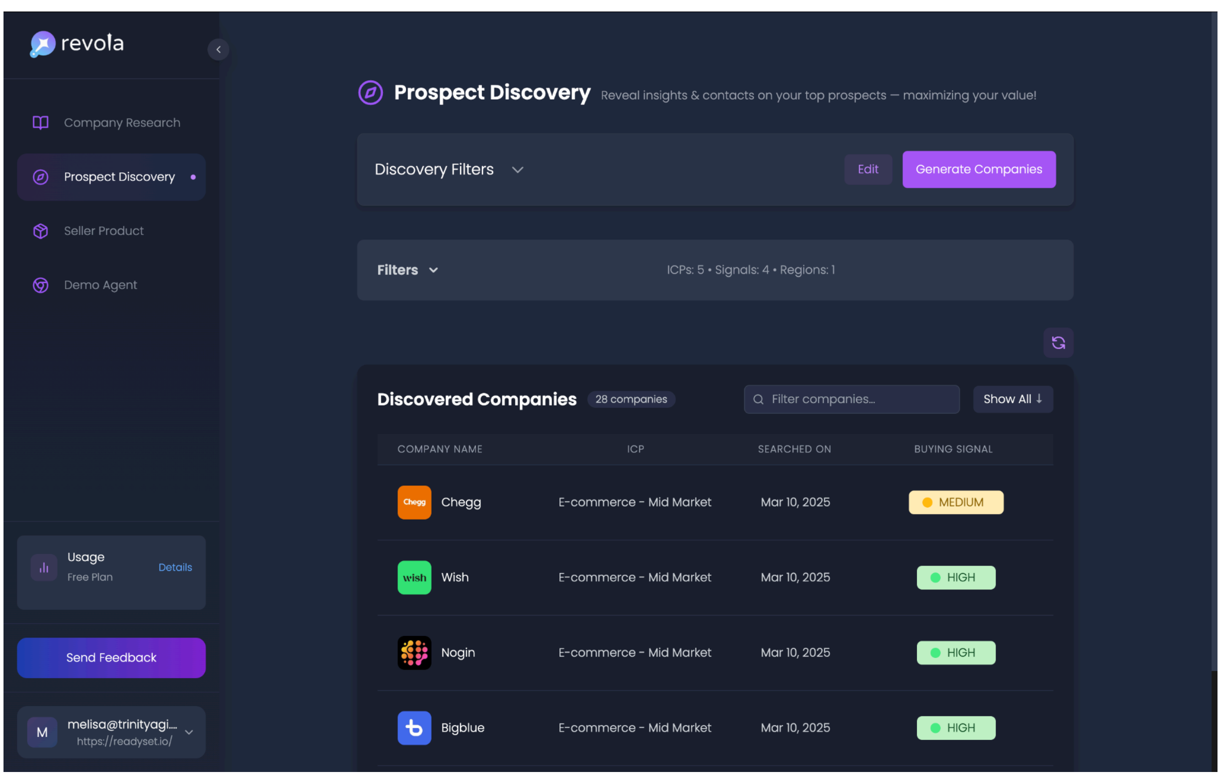
5. Adjusting Subscription Quantity

- You can increase or decrease the quantity at any time.
- However, any changes to the quantity will only take effect in the next billing cycle.
- You cannot reduce the quantity below 1.

6. Canceling Your Subscription

- To cancel, go to the Billing Section and click "Cancel Subscription".
- Once canceled, your subscription will remain active until the end of your current billing cycle, after which it will automatically expire.
- No further payments will be deducted after cancellation.

Troubleshooting & FAQs



Can I upgrade my subscription mid-cycle?

- Yes, you can increase the quantity at any time, but it will not change the billing anniversary.

Can I carry forward my deep research and discovery limits?

- Yes, you can carry forward credits for deep research and discoveries to three months as long as the subscription is active. After the subscription is cancelled or not renewed, the credits are removed.

What happens if I cancel my subscription?

- You will retain access until the end of your billing cycle. After that, your account will revert to the trial limits unless you resubscribe.

Can I downgrade my subscription?

- Yes, you can decrease the quantity for the next billing cycle, but it cannot go below 1 unit.

How do I know when my next payment is due?

- Your billing cycle and renewal date are displayed in the Billing Section.