Define how alby responds with Playbooks

Last Modified on 10/27/2025 12:20 pm EDT

Playbooks allow you to provide specific guidance to your alby AI Agent on how to handle different customer scenarios, such as helping them shop for the right item or recommending top selling items.

Playbooks can ensure your alby Agent delivers consistent, personalized experiences that align with your brand requirements. Playbooks are sets of instructions for alby on how to deal with specific scenarios for customers. One or more Playbooks can be activated for each Agent.

Think of Playbooks as enhanced rules for alby. Like rules, they have two parts: a trigger situation that activates the Playbook, and instructions that tell alby how to respond.

How Playbooks Work

Each Playbook consists of two main components:

- **Situation:** The specific scenario or context when the Playbook should be activated. Examples:
  - A customer is asking about order status
  - A shopper is browsing specific product categories.
- **Instructions:** Detailed guidance for how the Agent should handle the situation, including which Actions to take and in what order

Playbooks let you create tailored, context-specific shopping experiences for customers while keeping your rules and branding consistent. Some of the use cases for Playbooks in your brand include customizing how alby handles product recommendations for specific categories and offering support with customers' projects.

Tips for Playbooks

- Keep instructions clear and specific with exactly what you want your Agent to do.
- Duplicate and test your Playbooks in the playground before adding them to your widgets or chat.
- Use the Inbox to review customer interactions, and update your Playbooks accordingly.
- Keep each Playbook's use focused — only use one Playbook per topic.
- Be creative — Playbooks provide a sandbox for exploring your alby Agent's full capabilities.

Prerequisites

Before you make a Playbook, you should decide what Agent will use the Playbook, and what Actions it will use.

Create a Playbook

1. In the alby dashboard, click  **Agents**.
2. Navigate to the Playbooks section.
3. Click **Create New Playbook**.

4. Name your Playbook.
    a. The name is included when alby is determining when to use this Playbook, so name it something descriptive about the situation.
5. Define the situation that triggers this Playbook.
6. Write your instructions for the Agent, incorporating available Actions using the /.
7. Click **Save**.

Testing your Playbooks

In the playground of the Agents page, you can test your Agent and any Playbooks to make sure they work as expected.

Type your prompt into the chat window on the Playbooks page and see if your Agent runs the Playbook as you'd expect it to. If it doesn't, edit either the trigger or instruction information in the Playbook, then retry.

For example, you could test the first example from above by asking about a ski or snowboard and seeing if alby follows the Playbook.

> The preview will only test your live Playbooks. To avoid affecting active widgets or chat, create a test Agent that isn't connected to any widgets or chat, and set your Playbooks live for testing. Otherwise, you might update settings on live widgets or chats.