



Playbook Prompting

A practical guide for Playbook builders

Version 2.1

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Three Questions

Before writing any prompts, ask yourself these three questions to determine which prompt types you need.

Question 1

Do you need to find specific documents within a large set? → You need filtering prompts (Yes/No, List of Values, Range of Values or Date).

Question 2

Does your analysis depend on what's in each document? → You need filtering prompts with conditional logic to trigger follow-up prompts.

Question 3

Are you extracting or generating information from each document? → You need Text Output or Generative Output prompts.

What Is Filtering?

Filtering narrows your document set based on AI responses.

Example

You have 500 contracts. You ask “Does this include a break clause?” AI answers Yes/No for each. You filter to show only “Yes” documents. Now you work with 50 relevant contracts instead of 500.

Four prompt types can filter:

- **Yes/No:** Binary decisions (has clause / doesn't have clause).
- **List of Values:** Categories (jurisdictions, party names, document types).
- **Range of Values:** Numbers (contract values, durations, risk scores).
- **Date:** Identify a date (commencement, message sent, termination).

Tip

Responses to filtering prompts can also trigger follow-up prompts through conditional logic.

The Four Filtering Prompt Types

Yes/No

When to use: Identifying presence/absence of clauses, compliance checks.

Key rule: One specific question only—no compound queries.

Results: Filter documents, trigger conditional prompts.

Example

Does this lease agreement include a tenant break clause exercisable with 6 months' notice?

List of Values

When to use: Extracting names, jurisdictions, document types, risk categories.

Key rule: Always provide predefined values or example answers.

Results: Filter by category, group documents, trigger jurisdiction-specific analysis.

Example

Determine if the document contains any causes of legal action based on the following list. Answer with one or more of the following values: Contractual Breach, Tort, Financial Misconduct, Equitable Claims, Legislative Compliance, Insolvency. If the document contains no causes for legal action, respond with: "null".

The screenshot shows the Jylo interface with a document titled "Agreement on Final Milestone Dates.eml" open. On the left, there is a sidebar with navigation options like "Me", "Project", and "Marketplace". The main area displays the document content, which includes a "Cause of Action" prompt and a list of predefined values: "N/A", "Contractual Breach", "Equitable Claims", "Legislative Compliance", and "Tort". The "Contractual Breach" option is selected. On the right, there is an "Answers" panel showing the selected value and a "Show Evidence" button.

Figure 1. Defining responses in the prompt ensures no variations appear in the filtering panel.

Tip

Write list prompts to return predefined values, or set formatting instructions to prevent response variants from compromising filtering capabilities or conditional triggers.

Range of Values

When to use: Extracting values, durations or quantities, or assigning scores and ratings.

Key rule: Specify exact units and scale; use “null” (not “N/A” or “0”) for missing data.

Results: Filter by value or score, sort documents, trigger further analysis.

Example (extracting)

What is the total contract value in GBP? If the contract value cannot be determined, respond with: “null”.

Note

Without internet access, AI lacks present-day knowledge, so it is best not to ask for currency conversions.

Example (scoring)

Rate the confidentiality provisions in this NDA on a scale of 1–5 where 1 is basic confidentiality with significant gaps and 5 is best-in-class provisions. If the document does not contain confidentiality provisions, respond with: “null”.

Date

When to use: Identifying a date from the document.

Key rule: Specify the date type (start, end, sent, etc.).

Results: Filter, trigger conditions, sort results chronologically in export spreadsheet.

Example

What is the ‘Sent’ date of the first email to be sent in the thread? This will be stated in the ‘Sent’ field.

Using Filtering Prompts as Conditions

Filtering prompts can trigger other prompts through conditional logic, creating adaptive workflows that analyse documents differently based on their content.

How Conditional Logic Works

When you create a prompt, you can set conditions that determine when it should run. These conditions are based on the responses from your filtering prompts (Yes/No, List of Values or Range of Values).

First-layer prompts: Can only use conditions based on prompts positioned visually above them in the Playbook builder.

Sub-layer prompts: Can use conditions based on any first-layer prompt and sub-prompts positioned visually above them within the same branch.

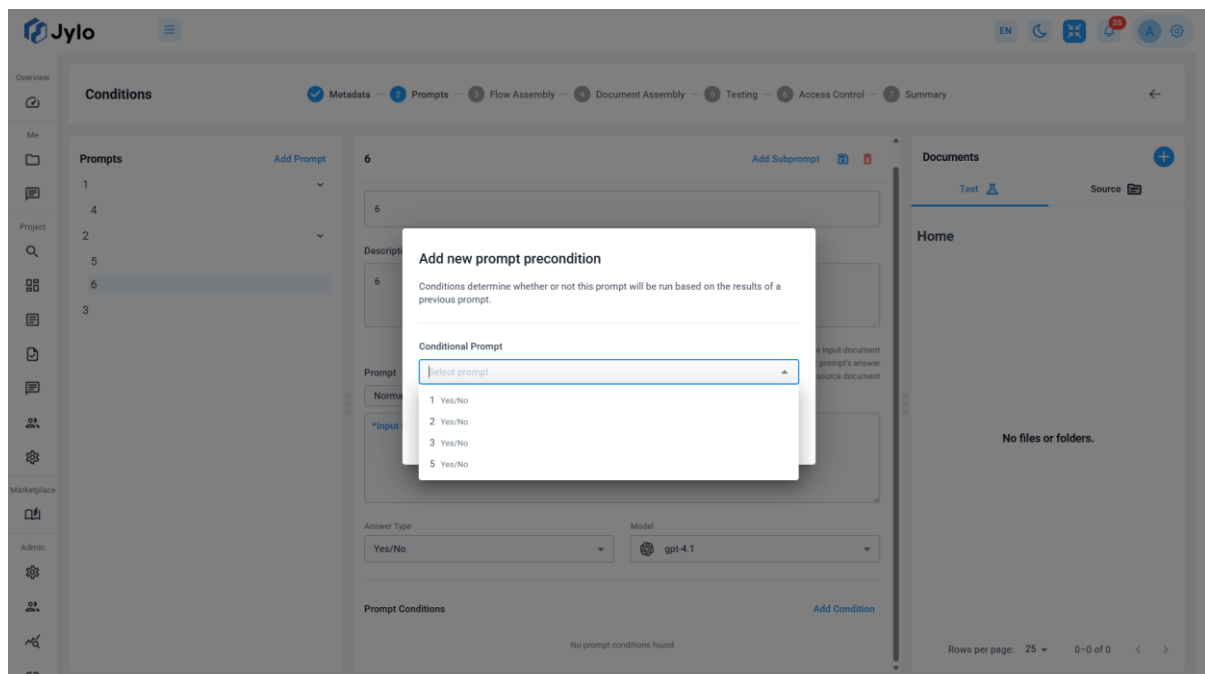


Figure 2. Prompt 6 can be conditioned on all parent prompts (1, 2, 3) but not prompt 4, as it exists in a different tree.

Conditional Logic Example

Break Clause Analysis

Configuring a follow-up to your Yes/No prompt about tenant break clauses:

IF break clause = “Yes” → Extract break clause terms and notice requirements (Text Output prompt).

Why this works: You only spend time extracting break clause details for leases that actually have them, saving AI credits and reducing noise in your results.

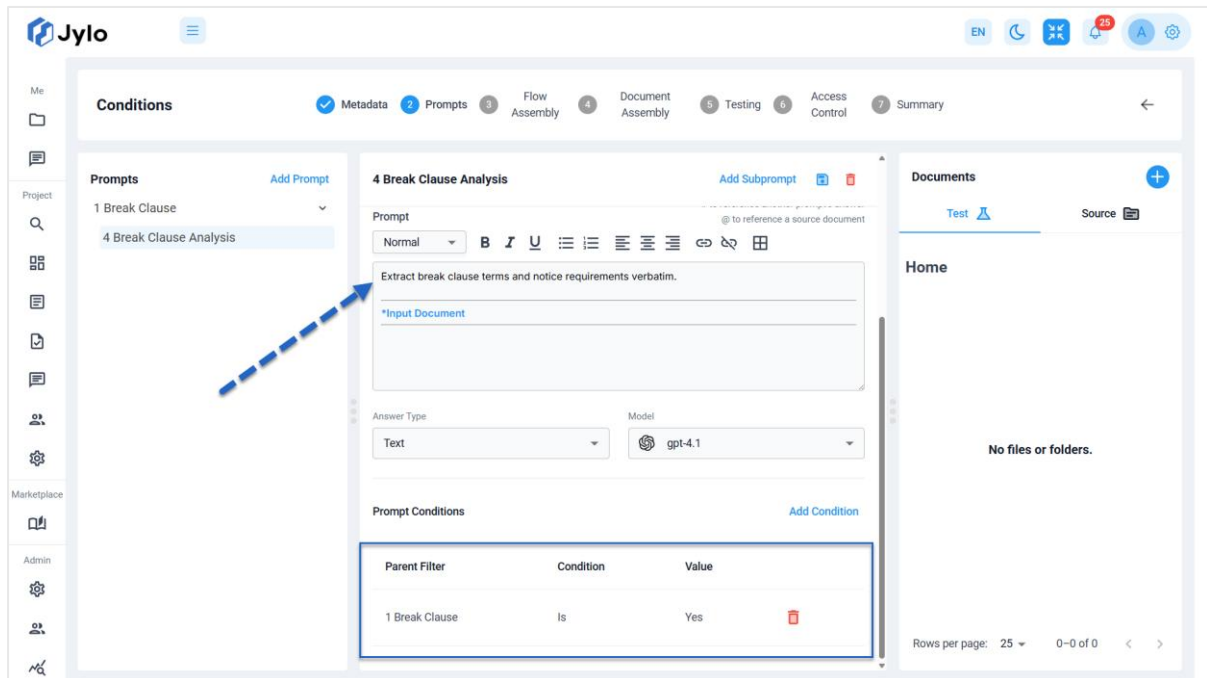


Figure 3. A Text Output sub-prompt conditioned on the parent Yes/No prompt returning “Yes”.

Analysis Prompts

These prompts create rich outputs but cannot filter datasets or trigger other prompts. They are often used as the “child” prompts triggered by filtering prompts in conditional workflows.

Text Output

When to use: Extract clauses and provisions in plain text with no filtering requirements.

Results: Verbatim text or short summaries without formatting applied.

Example

Who are the parties to this Share Purchase Agreement? Answer in a single sentence.

“The parties are Acme Corp Limited (Buyer) and John Smith (Seller).”

Generative Output

When to use: Executive summaries, risk assessments, comparative analysis, detailed reports.

Tip: Specify exact structure and format requirements.

Results: Create executive briefings, client summaries, due diligence reports.

Example

Summarise the key commercial terms of this contract. Structure your answer as follows: 1. Contract parties and roles 2. Scope of services/goods 3. Payment terms and total value 4. Duration and termination rights 5. Key obligations of each party. Use bullet points under each heading. Include citations to specific clauses.

Tip

Upload your in-house report template as a source document and attach it in the prompt field for the AI to follow.

Hash-Referencing

You can reference responses from other prompts by using the # symbol. This provides additional context for your current prompt.

- **First-layer prompts:** Can only reference responses to prompts positioned visually above them in the Playbook builder.
- **Sub-layer prompts:** Can reference any first-layer responses and responses of sub-prompts positioned visually above them in the same branch.

This referencing system works identically to how conditions function within the prompt structure.

Note

The hash symbol places only the response to the prompt, not the label, description or prompt itself.

Source Documents

Source documents are reference materials you can attach to individual prompts to provide additional context for the AI's analysis. For example:

- **Template matching:** Attach your organisation's standard report template.
- **Reference materials:** Provide regulatory frameworks or industry standards.
- **Example outputs:** Show the AI what a good answer looks like.

Attaching Source Documents

Upload source documents using the right panel in the Playbook prompt page. Use the @ symbol followed by the document name to attach your desired file.

Example

Summarise the key commercial terms of this contract. Structure your response following the format shown in @Report_Template.docx

This tells the AI to use the attached source document as a structural guide for its response.

Next Steps

Once you've finished writing your prompts, it's time to move on to the Outputs stage. This is where you can configure your output requirements using either the online editor or Microsoft Word templates. For a full guide, visit our [Assembly Building guide](#).

Prompt Writing Cheat Sheet

Prompt Type	Requirements	Output	Filters	Conditions
Yes/No	Single clear question only—no compound queries	“Yes” or “No” answer	✓	✓
List of Values	Define predefined values or example answers	Defined categories (one or more values)	✓	✓
Range of Values	Specify exact units/scale; use “null” for missing data (not “N/A” or “0”)	Single numeric value	✓	✓
Date	Specify the date type (start, end, sent, etc.)	Date value	✓	✓
Text Output	Extract or produce passages of plain text	Plain text response (short)	✗	✗

Generative Output	Specify structure and format requirements	Formatted content (reports, summaries)	X	X
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