Understanding AI in Simplero: Quick Reference

Which tool do I use?

Tool	Use it for
AI Search	Members finding answers in content they already have access to
Help Bots	A focused assistant with your own instructions, sources, and access rules
Simplero Coach	Your personal AI: drafting, brainstorming, building inside your account
Writing tools	Quick drafting/summarizing help inside Simplero fields
MCP / API	Connecting outside tools (ChatGPT, Claude) to your account

Things worth remembering

- **Access rules still apply.** AI only surfaces what a member can already see.
- **Give it context.** The more specific you are, the better the output.
- **Use the sources.** Linked sources let you verify an answer in one click.
- **Know your plan.** AI Search and Bots are Skyrocket-plan only; **Coach** is available on all plans.

Before you launch AI to members

- ☐ Test with a restricted, non-admin member account
- ☐ Check the sources/answers it's returning
- ☐ Check your account's AI credit balance under Settings → AI Usage & Limits
    - Set Your account level limits for AI usage for members
    - Selling AI access? Set up a Credits product to charge your own markup
- ☐ Set limits on either site level or bot level as well.
- ☐ Review member conversations to see what's actually being asked