PALCYAI / PALCIDUSAI

Advisor OS & AI Operating System Field Guide

40-page implementation guide for brains, agents, creator workflows, lead magnets, sales, research, recipe planning, approvals and operational safety.

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Practical, original implementation guidance. This guide distinguishes a generated plan from a verified live integration. WFG/AAT-specific materials require authorized source documents and compliance review.

How to Use This Guide

Use this field guide as a design and acceptance reference alongside the PALCYAI runtime, Creator Studio, and project SKILL.md. Each chapter includes a principle and an action checklist. It is not a claim that every integration described is already deployed.

Status vocabulary: **Drafted** means content was generated; **Submitted** means a request reached a runtime; **Provider-confirmed** means the external provider returned evidence; **Verified** means a defined acceptance test passed. Use these terms consistently.

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Chapter 01

The PALCYAI Operating Thesis

Principle

Treat AI as an operating layer, not a novelty chatbot. The system turns a request into a scoped task, selects a specialist, creates an artifact, evaluates it, and hands consequential actions to a human or verified integration.

Implementation playbook

> Write a one-sentence promise for the system. Define the user, recurring job and measurable outcome. Keep promises tied to capabilities you have actually tested.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 02

The Chief Brain

Principle

The Chief Brain is the orchestration layer. It clarifies the objective, decomposes work, selects specialists, maps dependencies and sets acceptance criteria. It must not claim another agent executed work unless a task record proves it.

Implementation playbook

For each request, produce: goal, constraints, deliverables, specialist assignments, dependencies, risks, approvals and done criteria.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 03

Brains, Agents, Workers and Skills

Principle

A brain is a domain knowledge and governance area; an agent is a role with instructions and tools; a worker is an executable task handler; a skill is reusable operating guidance. Keep these terms explicit in the registry.

Implementation playbook

Maintain a versioned registry with ID, purpose, inputs, outputs, tools, permissions, evaluation and escalation path.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 04

Task Lifecycle

Principle

A useful task lifecycle is received, validated, queued, running, completed or failed, with approval required where relevant. Persistent records and audit events let operators inspect what happened.

Implementation playbook

Store task ID, worker ID, timestamps, status, model, usage, error code and approval state. Test failure paths as carefully as success.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 05

Real AI vs Static UI

Principle

A polished card is not an operational worker. Real execution requires a server-side model key, authenticated API request, a task record and a real response. Browser-only local storage can keep preferences but cannot enforce business rules.

Implementation playbook

> Use an acceptance test that requires a non-empty provider response and task ID. Never label a local draft as a live external action.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 06

Human Approval

Principle

Human approval protects clients, reputation and money. Draft generation can be automated; sending, publishing, booking, changing production data and deployment require explicit controls.

Implementation playbook

Use proposed → approved/rejected → executed → provider-confirmed states. Record who approved, what was approved, and the exact action result.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 07

Security Boundaries

Principle

Keep provider API keys on the server. Use separate runtime tokens, least privilege, origin allowlists, rate limits, secret rotation and access isolation. Static HTML must never contain a private provider key.

Implementation playbook

> Use environment variables or a managed secret store. Never commit `.env` or paste secrets into chat. Rotate any key exposed accidentally.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 08

Knowledge and Source Policy

Principle

Knowledge needs provenance. Distinguish source facts, model inference and recommendations. Track source title, URL, retrieval date, rights and confidence.

Implementation playbook

For every material claim, capture the supporting source and whether it is public, user-supplied or licensed. Avoid reproducing copyrighted books or private recordings.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 09

Memory and Continuity

Principle

Memory should preserve stable project decisions, not silently convert guesses into facts. Sensitive data should be minimized, and users need a way to review or correct remembered context.

Implementation playbook

Store project preferences and approved decisions with timestamps. Keep client personal data out of broad agent memory unless needed and authorized.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 10

Evaluations and Acceptance

Principle

Evaluation should measure correctness, completeness, safety, tool use, evidence and user outcome. Syntax checks are useful but do not prove a product works end to end.

Implementation playbook

Create happy-path, invalid-input, unauthenticated, provider-down, timeout, duplicate-submit and rollback tests for every workflow.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 11

Creator Studio Architecture

Principle

The Creator Studio should be a front door for website, book, lead magnet, app, webinar, video, presentation and YouTube creation. Each template gathers the right brief before invoking a specialist worker.

Implementation playbook

Ask audience, objective, format, constraints, brand, CTA, sources, deadline and acceptance criteria. Produce an output manifest and clear next steps.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 12

Website Creation Workflow

Principle

A complete website deliverable includes requirements, sitemap, page copy, design system, responsive implementation, accessibility, SEO, analytics, privacy/consent, tests and deployment/rollback plan.

Implementation playbook

Before deployment, test navigation, mobile layouts, forms, error states, metadata, image/video paths and production configuration. Report deployed only after a live URL check.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 13

Lead Magnet Design

Principle

A useful lead magnet solves one specific problem for one specific audience. The format is secondary to the promise, usefulness and fit with the next step.

Implementation playbook

Define ideal reader, urgent problem, measurable promise, title, outline, delivery format, opt-in fields, consent text, thank-you page, fulfillment and follow-up.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 14

MIFGE Coaching Framework

Principle

MIFGE is publicly used to mean “Most Incredible Free Gift Ever.” Use it as a coaching prompt for a compelling, genuinely valuable gift and a transparent next-step offer—not as a license to copy another marketer’s protected material.

Implementation playbook

Ask one question at a time: ideal prospect, painful problem, valuable outcome, existing assets, proof, delivery cost, offer terms, CTA and fulfillment capacity.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 15

Gift Offer Transparency

Principle

Free-gift campaigns need honest claims and clear conditions. If a gift is tied to a subscription, shipping, trial or paid offer, disclose the terms prominently before signup.

Implementation playbook

Avoid invented retail values, fake scarcity, hidden continuity, prechecked consent and confusing opt-out. Measure qualified leads and downstream value, not downloads alone.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 16

One-Time Gift Fulfillment

Principle

A one-gift rule cannot be safely enforced with browser localStorage alone. It needs a backend identity or verified recipient, a database uniqueness constraint, idempotency and an audit trail.

Implementation playbook

Use a unique `(recipient_id, campaign_id)` constraint, verified email, consent timestamp, single-use claim token, signed expiring link and duplicate-request response with contact CTA.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Email Delivery and Proof

Principle

A page saying “sent” is not proof. A delivery workflow should record provider message ID, accepted/delivered/bounced status and webhook signature validation.

Implementation playbook

Send only after consent and confirmation. Test with an owner-controlled inbox, inspect provider events and ensure retries do not duplicate the gift.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 18

LinkedIn Opportunity Strategy

Principle

An authorized LinkedIn export can help surface likely sales, partnership, speaking and referral opportunities. Scores should be explainable and should not overstate what profile data proves.

Implementation playbook

Use minimal columns, document the scoring rubric, prioritize relevance, draft individualized messages and let a human review. Do not automate bulk messaging or bypass platform terms.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 19

LinkedIn Data Hygiene

Principle

Contact exports can contain personal data. Limit access, avoid uploading unnecessary sensitive fields, set retention rules and use data only for a legitimate purpose.

Implementation playbook

Remove irrelevant columns, deduplicate, normalize companies/roles, track source and date, and separate observed facts from inferred interests.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 20

Sales Assistance

Principle

Sales AI should help qualify fit, prepare discovery, organize objections and create thoughtful follow-up. It should not invent a relationship, claim results, or contact people without permission.

Implementation playbook

Define lead stages, qualification fields, next step, owner, due date, evidence and exit criteria. Track conversion by stage and source.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 21

AI Agency Coaching

Principle

An AI agency needs a focused offer, clear buyer, delivery process, proof, capacity planning and repeatable customer success—not only tools.

Implementation playbook

Choose one initial service package. Define scope, onboarding, baseline, deliverables, turnaround, QA, change requests, security and renewal review.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 22

Webinar Creation

Principle

A webinar is a structured learning and conversion experience. It needs an audience promise, agenda, useful teaching, demonstration, transparent CTA and follow-up for attendees and no-shows.

Implementation playbook

Rehearse audio/video, links, slides, captions, timing, moderation, backup recording and CTA. Test registration and replay access before promotion.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 23

YouTube Channel Launch

Principle

A channel needs a recognizable audience promise, repeatable content pillars and a sustainable publishing cadence. Channel setup alone does not create discovery.

Implementation playbook

Draft channel description, banner/avatar specifications, three content pillars, first 12 topics, title/thumbnail hypotheses, scripts, metadata and analytics review.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 24

Video Production

Principle

A production-ready video brief includes goal, viewer, hook, script, scene list, voiceover, b-roll, captions, aspect ratio, thumbnail and distribution versions.

Implementation playbook

Track source assets, rights, music licenses, captions, export specs and review approvals. Never claim a rendered file exists until a render is verified.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 25

Presentation Design

Principle

A strong presentation has one clear audience, one main message and a logical narrative. Slides support the speaker rather than duplicate a document.

Implementation playbook

Specify purpose, audience, slide count, proof points, visual style, speaker notes, sources and desired audience action.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 26

App Creation

Principle

App creation starts with user problems and workflows, then requirements, screens, data model, API contracts, permissions, failure states and tests.

Implementation playbook

Define roles and permissions, data retention, audit events, accessibility, backup, deployment, rollback and a small acceptance test suite.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 27

Research Brain

Principle

Research should separate verified facts, plausible interpretations, unknowns and recommendations. It must not claim live research when no sources were retrieved.

Implementation playbook

Define question, scope, time range, source hierarchy, search strategy, extraction template, conflicting evidence and confidence.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 28

Recipe Brain for Tina

Principle

A household recipe assistant should reflect preferences while still offering variety. This profile emphasizes Mangalorean and Tamil cuisines, broader Indian regional dishes and world recipes.

Implementation playbook

Ask servings, allergies, restrictions, prep time, budget and pantry. Rotate grains, proteins, vegetables and techniques; offer two or three meals per day as requested.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 29

Indian Regional Meal Planning

Principle

Indian cuisine varies across regions and communities. Meal planning should distinguish regional styles rather than treating all dishes as interchangeable.

Implementation playbook

Rotate coastal fish curries, Mangalorean kori rotti-style meals, Tamil kuzhambu and poriyal, North Indian roti/dal, eastern fish/vegetable dishes, western regional specialties and world options.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 30

Recipe Safety and Shopping

Principle

Recipes should include quantities, sequence, heat level, substitutions, leftovers and safe handling. Allergies and cross-contamination matter more than culinary personalization.

Implementation playbook

Generate a consolidated shopping list by produce, proteins, pantry and spices. Include storage guidance and safe internal temperatures for meat/fish where appropriate.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 31

Advisor OS Boundaries

Principle

Advisor OS supports education, workflow and client-service preparation. It must not substitute unlicensed personalized financial or insurance recommendations or claim compliance approval.

Implementation playbook

Separate general education from client-specific advice. Require licensed-human review, source/date checks, jurisdiction and approved disclosures for regulated materials.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 32

WFG/AAT Materials

Principle

WFG/AAT-specific books should be built only from authorized material and user-approved notes. Product, compensation and compliance content may be proprietary or change over time.

Implementation playbook

Create a separate book per approved strategy, cite authorized sources, mark assumptions, include review date and compliance review checkpoint. Do not invent or reconstruct unavailable proprietary content.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 33

Affiliate Marketing

Principle

Affiliate content should be relevant, truthful and transparent about commercial relationships. Product claims need evidence and program terms should be verified.

Implementation playbook

Document audience fit, approved claims, affiliate disclosure, link tracking, comparison criteria and review date. Do not fabricate commissions or publish without approval.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 34

Content Repurposing

Principle

Repurposing adapts one useful idea to the conventions of each channel rather than copying the same text everywhere.

Implementation playbook

Start from a source asset; derive short video, carousel, post, email, webinar segment and FAQ. Preserve claims and cite the original source.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 35

Workflow Automation

Principle

A robust workflow includes trigger, validation, idempotency, retries, dead-letter handling, alerts, logs, approvals and rollback.

Implementation playbook

Test duplicates, timeouts, rate limits, provider outages and partial success. Use test data and a kill switch before production.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Chapter 36

Approvals and Notifications

Principle

An approval queue is not an email notification. Notifications need a connected provider, destination verification, webhook/event evidence and retry handling.

Implementation playbook

Record approver, decision, timestamp, task ID, action payload hash and provider event. Send a test to an owner-controlled inbox before enabling client alerts.

Acceptance questions

Can a new operator explain the inputs, output, responsible worker, permissions, evidence, failure behavior and next human decision? Are claims supported by sources or a test result? Is the user told clearly when an external action has not happened?

Reference Notes and Further Reading

The user-provided replay URL could not be fetched directly in this environment. Publicly indexed Create Revenue Now material describes a free book and masterclass. Public commentary describes MIFGE as “Most Incredible Free Gift Ever.” This guide uses high-level ideas only and does not reproduce or claim to summarize the private replay.

Public reference: Create Revenue Now — Free Book & Masterclass: https://createrevenuenowbook.com/

Public discussion of the MIFGE concept: https://www.innercircleforlife.com/blog/s2e4-vre-magnetic-marketing-dan-kennedy-episode-1

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