Agent backup checklist

AI Playbook For Me · aiplaybookforme.com · Free

Back up once (about 20 minutes). Rebuild calmly if you ever need to. Keep this page with your backup, **outside your Grok Bot account**.

Last updated: ____ / ____ / ______

Part A: Make the backup

- [ ] **1. Bot instructions.** For each Bot, copy its name, one line job, and full description word for word. The description is where rules that should stay true belong. [1]
- [ ] **2. Skills.** Save the name and full text of every private skill. Your private skills are one shared library, listed under Connect apps → Your plugins → Manage plugins and skills → Private skills. [2]
- [ ] **3. Routines.** For each routine, write the owning Bot, schedule and time zone, input source, expected result, approval rule, what happens when a source is missing, and whether it is on or paused today. Find them under View conversation details → Routines. [2]
- [ ] **4. Memory notes.** List what each Bot has learned that you would hate to teach again. A duplicated Bot does not carry learned memory, so write it down and move the important parts into the description. [1]
- [ ] **5. Connectors list.** Write the app names you connected and which Bots use them. Connectors are account wide. [3]
- [ ] **6. No secrets.** No passwords, one time codes or API keys anywhere in this backup. [1] [3] *(general advice for the backup itself)*
- [ ] **7. Handoff file (more than one Bot).** Copy your shared handoff file: each Bot's job, who hands what to whom, which routine belongs to which Bot, open items with dates. *(general advice)*
- [ ] **8. Store it outside the account.** Your own notes app, your own cloud drive, or this printed page. A working copy in `/workspace` is fine too, but not as your only copy. [3] *(general advice)*

Part B: Recover

- [ ] **9. Stop first.** Check whether the old Bot or its routines still exist. Hiding a Bot does not pause it or its routines. [1]
- [ ] **10. Reconnect apps** from your connectors list through Connect apps. [3]
- [ ] **11. Restore the Bot, skills and memory notes** from your saved text. Check skills show up under Private skills. [1] [2]
- [ ] **12. Rebuild routines, then pause each one right away.** A duplicated Bot carries its routines, and we could not confirm in the docs whether those copies start switched on, so check them and pause them too. [1] [2] *(pausing right away is general advice)*
- [ ] **13. Test with safe inputs.** A test run performs real work, so keep sending, posting and deleting behind your approval. [2]
- [ ] **14. Check what already went out** (sent mail, posts) before you switch anything on, then turn routines on one at a time. *(general advice)*
- [ ] **15. Update this backup** and write the new date at the top. *(general advice)*

Tip: add this line to every routine so an extra run is much less likely to repeat the work: "Before you send or post, check the log. If today's item is already marked done, stop." The docs suggest making retries idempotent where possible. [2]

Sources (Grok Bot docs, checked Oct 19 2026):

[1] docs.x.ai/grok-bot/bots · [2] docs.x.ai/grok-bot/skills-routines-and-automations · [3] docs.x.ai/grok-bot/computer-and-apps

Want the full step by step path? Lessons 1 and 2 are free at aiplaybookforme.com/intake.html. The full 5 lesson starter pack is $39 once, no subscription.