

EREZAGENT

FIRST VALUE

Customer Onboarding Guide

Configure the minimum foundation, then reach a real outcome quickly.

WHAT THIS DOCUMENT EXPLAINS

A focused onboarding path for a new ErezAgent customer: identity, timezone, backup, AI provider, connectors, first goal, first venture or business model, roles and the first governed execution. It avoids turning onboarding into a tour of every screen.

Customer Onboarding Guide

New Customers • Implementation Teams • MSPs • Customer Success

Reach One Real Outcome Before Expanding the Platform

The first week should prove usefulness, control and repeatability.

ErezAgent contains many departments and operating capabilities, but new customers do not need to configure all of them. The shortest path to value is to establish the safety and identity foundation, connect the minimum resources, then run one business objective or process end to end.

FIRST-VALUE RULE

Do not begin by enabling everything. Begin with the customer’s highest-value starting point: an outcome, an idea, a requirement or an existing business process.

1 — FOUNDATION

Set Identity, Time and Backup Before AI Work

These settings affect almost everything that follows.

Complete the owner identity and Company Foundation so the platform knows who it is operating for and what the company priority is. Confirm the installation timezone so deadlines, schedules and reports are interpreted correctly. Configure the backup destination and schedule before importing meaningful customer data or allowing broad automation.

The platform’s setup journey and Start Here guidance are designed to point to the next required step rather than exposing the full navigation as a checklist. Treat the initial foundation as operational configuration, not marketing profile information. A new installation starts with an empty workspace: no example business records are created, so dashboards and the Board reflect only the customer’s own data.

Foundation item	Done when...
Owner identity	The accountable owner account is confirmed
Company Foundation	Purpose / priority and company context reflect the real organization
Timezone	The customer’s operating timezone is correct
Backup	A scheduled backup exists and responsibility is assigned

Foundation item	Done when...
Licence / trial	The intended entitlement is active and limits are understood; renewal reminders start 14 days before a trial or licence ends
Provider connection (optional)	Not used, or the owner has read the shared and never-shared lists, confirmed the provider's address and consented in Settings > Provider / Managed Service

2 — AI RESOURCES

Connect One Reliable Model Path

The customer can add more providers later; the first objective needs one working path.

Configure at least one supported AI provider or a validated local model. ErezAgent's Model Gateway can route different task types across providers, but onboarding should first prove one dependable configuration. If privacy requirements call for local-only analysis, verify the private model before importing sensitive material because protected paths are designed to fail rather than fall back silently to cloud AI. The model catalog includes Claude Haiku 5.5 (the fast tier) and Gemini 4 Argon, among others.

Define a practical token/cost budget and make sure the customer knows where usage is visible. The objective is to establish cost awareness from the beginning rather than discovering model spend after multiple departments are active.

3 — CONNECTORS

Connect Only What the First Use Case Needs

An integration should exist because the first workflow needs it, not because it appears in a catalog.

For a founder, the first connector might be Gmail. For an operating business it may be calendar, CRM, Slack, a payment provider or another system. Activate the connector, run the connection/health check and verify the actions ErezAgent is actually allowed to use.

If the required application is not covered by a managed connector, evaluate the configurable REST connector or MCP integration rather than adding a custom integration prematurely. Capability readiness should report what is operational, configured, disabled or unavailable. ErezAgent includes 39 managed connectors and a 42-provider catalog of declarative HTTP actions.

Use Outcome, Mission, Requirement or Existing Business

ErezAgent supports several entrances into the same operating system.

Customer arrives with...	Recommended onboarding path
A desired outcome	Start / Goal Shaping → Intake Brief → objective / venture proposal → Board
A product idea	Mission → requirements → blueprint → delivery plan
Customer requirements	Requirements intake → gaps/assumptions → solution path
An existing business	Business Twin or focused process configuration → review → approved change set
A known workflow problem	Configurable records/workflows/tasks/approvals → pilot execution

Do not force a Business Twin exercise on a founder who simply wants to validate and launch a product. Likewise, do not force a blank-slate venture workflow on an established SMB that already has years of processes and documents. The onboarding path should reflect what the customer already knows.

Create the Business Boundary Before Scaling Work

A venture is the context boundary for strategy, customers, staff and operational AI behavior.

Create or confirm the venture that owns the first objective. Review its Venture Foundation, target market, business model and communication/operating context where applicable. This reduces generic AI behavior because agents and Board decisions can operate with venture-specific context rather than the company’s global information alone.

If the customer is an agency or provider, decide whether the first scenario belongs to the provider’s own venture or a client workspace. Make the boundary explicit before importing data or inviting staff. If the first venture uses a custom domain, add both the DNS A record and the TXT record that proves ownership; certificates are issued only for a proven domain. If a provider manages the installation, the owner decides at this step whether to connect it for optional status reporting, which sends only count-level operational status and nothing before the owner consents.

Invite the Minimum Team and Define Who May Decide

Permissions should be established before automation expands.

Keep the first onboarding roles small: the owner, one operator where needed, and the staff/customer identities involved in the pilot workflow. Use observer access for people who need visibility without the ability to make changes. Venture staff should receive focused role definitions and workspace views rather than broad administrative access.

Review which actions require owner approval, which can run automatically, and what budgets or spending boundaries apply. The customer should experience at least one approval card in the first real workflow so the governance model is understood before higher-volume execution begins. Agent policies (Read CRM, Create Deals, Send WhatsApp, Spawn Sub-Agents, Modify Agents) can be set per agent and are enforced per workspace.

7 — FIRST GOVERNED EXECUTION

Move Beyond Setup Into Real Work

A customer is not onboarded because all green checks are visible; onboarding ends when the system creates value safely.

Run the selected objective or operational workflow with real non-production or low-risk data. Observe the Board/agent reasoning, mission or workflow steps, connector actions, approvals and resulting records. Resolve missing capabilities rather than bypassing them with manual simulation.

Record the result against the intended metric. If the first scenario was customer onboarding, measure completion time or outstanding-document reduction. If it was market research, measure whether the decision materially improved. If it was software delivery, capture the requirements, verification and deployment evidence.

FIRST VALUE ACHIEVED

The customer can describe one business outcome ErezAgent helped move forward, show the execution/audit evidence, and identify who owns the next step.

8 — EXPAND DELIBERATELY

Add Departments and Automation After the First Loop Works

The second phase should reuse what was learned rather than restart onboarding.

Once the first workflow is stable, add the next connector, staff role, objective, process or venture based on actual demand. For existing businesses, Business Twin can broaden the modeled operating environment. For agencies

and MSPs, a proven configuration may become a sanitized reusable template. For founders, the next phase may be sales, support or customer-success operations after launch.

Use health checks, budgets, backup verification and attention signals as part of normal expansion. More autonomy should follow demonstrated control and clear ownership, not simply the passage of time. Upgrades check free disk space first, take a pre-upgrade backup and roll back automatically if a core service fails its health check.

ONBOARDING COMPLETE

What “Ready” Looks Like

A successful onboarding leaves the customer able to operate without depending on a guided demo.

Ready state	Evidence
Foundation	Identity, company/venture context, timezone and backup are correct
AI	At least one provider/model path is healthy and cost visibility is understood
Integration	The connector(s) needed by the first use case are operational
Authority	Roles, approvals and staff/customer boundaries behave correctly
First value	One objective or workflow completed with measurable evidence
Operations	The customer knows where to check health, usage, approvals and backups, and, if a provider is connected, what the last status report contained
Next step	A named second use case exists, not a vague plan to “use more AI”

IMPLEMENTATION PRINCIPLE

The customer should leave onboarding with a working operating loop, not a long list of configured features they have never used.