

// FREE GUIDE BY @AVIGRONDIN

Harvey: the full setup guide

AI SALES AGENT

An open-source agent that finds businesses, writes the cold email and works the replies. It thinks on the Claude plan you already pay for.

01 INSTALL

02 TRAIN

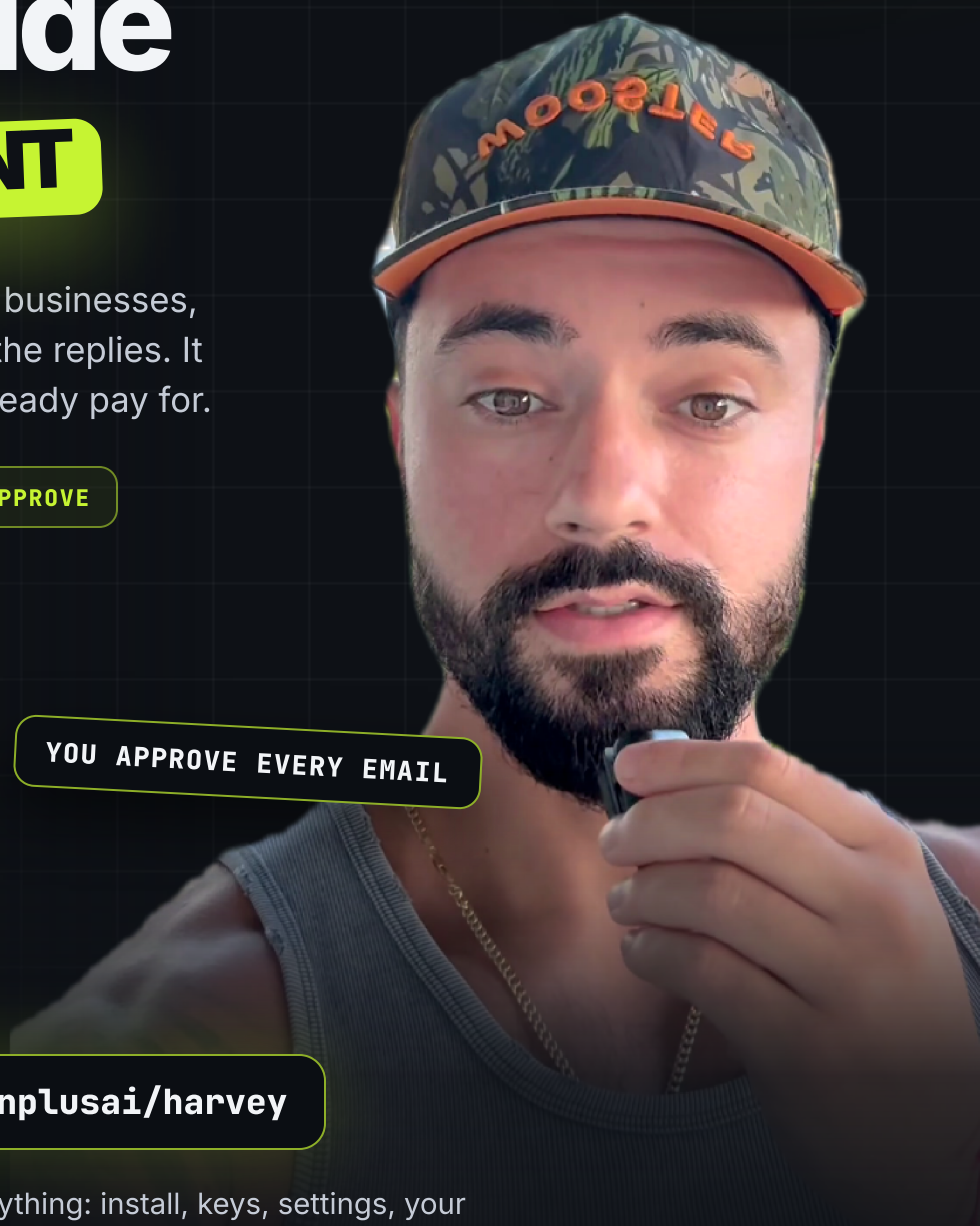
03 APPROVE

YOU APPROVE EVERY EMAIL

THE REPO

github.com/ethanplusai/harvey

You commented HARVEY. Here is everything: install, keys, settings, your first prospect list, the approval outbox and the rules that keep your domain out of spam. Harvey is built by Ethan Rogers (ethanplusai), MIT License. I did not build it. I am showing you how to run it.



harvey run

// 02 • WHAT HARVEY IS

A sales rep that lives on your laptop.

Harvey finds businesses worth selling to, reads their websites, writes a short email about something real it found, and works the replies toward a meeting. It runs on your computer and wakes up every 15 minutes.

01

Find

Pulls businesses in your market from a list source.



02

Read

Visits each website and notes facts you can use.



03

Write

Drafts a 3-email sequence per prospect.



04

You approve

Nothing leaves until you press approve.

WHAT IT COSTS

The thinking

Your Claude Pro or Max plan through Claude Code. Or a ChatGPT plan through Codex (page 17). No API key, no per-token bill.

Finding businesses

\$0 on the default source, OpenStreetMap. About **\$0.37 per 1,000** on the cheapest paid one.

Reading their sites

\$0. A few plain web requests per business. No AI call.

Sending

A mailbox. About **\$7 a month** for Google Workspace.

Lead databases

None. No Apollo, no ZoomInfo, no Clearbit, no Clay.

WHY THE PLAN MATTERS

Most AI sales tools bill per token, so an agent thinking all day costs money all day. Harvey sends its thinking through the **cClaude** command you already log into, and uses plain code for everything that does not need judgment.

WHO BUILT IT

Harvey is built by Ethan Rogers (ethanplusai), MIT License. Free and open source. Get it at github.com/ethanplusai/harvey. This guide follows release 0.3.0.

// 03 • BEFORE YOU START

Three things, then one sentence.

You need a recent Python, Claude Code logged in, and a mailbox to send from. Then the easiest route is to let Claude do the setup with you.

WHAT YOU NEED

- ✓ **Python 3.11 or newer.** Check with `python3 --version`. A Mac ships 3.9, so run `brew install python@3.13` first.
- ✓ **A Claude Pro or Max plan, logged in.** Run `claude login` once. Using ChatGPT instead? See page 17.
- ✓ **A mailbox on a separate domain.** Gmail or Google Workspace is the recommended one. Never your main domain (page 16).
- ✓ **A free email-checker key.** Without one, Harvey will not send to anyone (page 06).

ROUTE A • LET CLAUDE SET IT UP (EASIEST)

1. Open Terminal and run these three lines:

```
git clone https://github.com/ethanplusai/harvey.git
cd harvey
claude
```

2. When Claude Code opens, type **"set up Harvey for me"**.
3. Answer its questions one at a time. The repo ships a `CLAUDE.md` file that turns Claude into the setup guide: it checks what is installed, installs what is missing, asks for your keys and trains Harvey on your product.

STILL READ PAGES 05 TO 15

Claude will ask you for keys and settings. You answer faster, and safer, when you know what each one does.

ON A MAC, SAY THIS TOO

Some of the repo's own setup notes say plain `python3`, which is 3.9 on a Mac. Tell Claude: **"use python3.13 for the venv."**

// 04 • ROUTE B • BY HAND

Or install it yourself.

The same setup, typed in Terminal from inside the harvey folder. Each step is safe to run again.

01 Get the code

```
git clone https://github.com/ethanplusai/harvey.git &&  
cd harvey
```

02 Install it

```
python3.13 -m venv .venv && source .venv/bin/activate &&  
pip install -e .
```

Note `python3.13`, not `python3`. A venv built from the Mac's 3.9 cannot run Harvey.

03 Add your keys

```
cp .env.example .env
```

Then open `.env` in any text editor and fill it in (pages 05 and 06).

04 Teach it your product

```
harvey train https://your-company.com
```

05 Pick what a good prospect looks like

```
harvey signals --confirm free
```

06 Find businesses

```
harvey discover
```

07 Watch it work

```
harvey dashboard  
harvey run
```

The dashboard opens at `http://localhost:5555`.

NEW TERMINAL WINDOW?

Run `source .venv/bin/activate` first. Skip it and you get `command not found: harvey`.

PREFER QUESTIONS?

`harvey setup` runs an interactive setup wizard in Terminal. `harvey install` installs the packages plus the browser it uses.

// 05 • THE KEYS FILE • PART 1

Your mailbox: how it sends and reads.

`.env` holds your passwords and keys. It stays on your computer and git ignores it. The one thing Harvey must have in it is a way to send email and read the replies. Pick one.

OPTION A • RECOMMENDED

Gmail or Google Workspace

Best for under 50 cold emails a day. Fill in `EMAIL_CLIENT_ID` and `EMAIL_CLIENT_SECRET`.

OPTION B

Any SMTP + IMAP mailbox

AgentMail, Fastmail, or a Workspace app password. Fill in `SMTP_HOST`, `SMTP_PORT` (587), `SMTP_USERNAME`, `SMTP_PASSWORD`. The `IMAP_` lines copy those if left blank.

OPTION C • LEGACY

Instantly

Fill in `INSTANTLY_API_KEY`. Their API needs the Growth plan or higher.

EMAIL IN FIVE STEPS

1. In **Google Cloud Console**, make a new project and turn on the **Gmail API**.
2. Go to **Credentials**, create an **OAuth client ID**, type "Desktop app".
3. Paste the client ID and secret into `EMAIL_CLIENT_ID` and `EMAIL_CLIENT_SECRET`.
4. In your settings file, set `provider: "gmail"` under `channels: email:` (page 07).
5. Run `harvey gmail auth` once and log in. Then `harvey gmail test` checks the connection.

WHAT IT LOOKS LIKE IN `.env` (YOUR VALUES GO AFTER THE =)

```
EMAIL_CLIENT_ID=  
EMAIL_CLIENT_SECRET=
```

NEVER SHARE THIS FILE

`.env` holds real secrets. Never paste it into a chat, a screenshot or a public repo. Every value in this guide is left blank on purpose.

MATCH THE TWO FILES

Whichever option you fill in here, set `channels.email.provider` to the same one: `gmail`, `smtp` or `instantly`.

// 06 • THE KEYS FILE • PART 2

Checking addresses, finding businesses.

Harvey only sends to addresses it could check. With no checker key, every address it finds is marked `guess` and never sent. Optional on paper, required in practice.

CHECK THE ADDRESS (ADD AT LEAST ONE)

REOON_API_KEY The best free tier for cold email: 600 checks a month. Get it at reoon.com.

ZEROBOUNCE_API_KEY 100 free a month. Harvey routes Microsoft 365 and Google Workspace catch-all domains here.

HUNTER_API_KEY 50 checks and 25 domain searches a month free. Used first to learn a company's address format.

HUNTER_MONTHLY_SEARCHES How many Hunter domain searches Harvey may use a month. 25 matches the free tier.

FIND BUSINESSES (ALL OPTIONAL: THE FREE SOURCE NEEDS NO KEY)

DATAFORSEO_LOGIN
DATAFORSEO_PASSWORD Cheapest local-business and search data. The password is the API password made for you on their API access page, not your account password. \$1 free credit, \$50 minimum deposit to go live.

DATAFORSEO_SANDBOX Put any value here to use their free sandbox: dummy data, never charged. The right way to try it.

SERPER_API_KEY Google search API. 2,500 free queries, no card. Without it Harvey falls back to DuckDuckGo and Bing, which limit hard.

EXTRAS (LEAVE BLANK TO SKIP)

LINKEDIN_EMAIL
LINKEDIN_PASSWORD Lets Harvey prospect on LinkedIn by driving a browser. This breaks LinkedIn's terms and can get the account banned. Only use an account you can afford to lose.

CLOUDFLARE_ACCOUNT_ID
CLOUDFLARE_API_TOKEN A deeper read of your own site during `harvey train`. About \$5 a month on the paid Workers plan. Without it a built-in crawler is used.

// 07 • THE SETTINGS FILE

Who you are and what you sell.

The second file is plain settings: `harvey.yaml`. Every email Harvey writes is built from it. Read it line by line before your first send.

THE ONE THING MOST PEOPLE WILL MISS

`harvey train` saves its results to `harvey.local.yaml`, and when that file exists Harvey uses it instead of `harvey.yaml`. After training, edit `harvey.local.yaml`. In it, check three things: it names the sender "Harvey" at `harvey@your domain` (a guess), it sets the mail provider to `instantly`, and it has no `offer` block. Fix the sender, set your provider, and paste in the offer lines below.

PERSONA • THE SENDER

<code>name, company, role</code>	The person and company the email comes from. Use a real name.
<code>email</code>	The from address. Your mailbox on the sending domain.
<code>tone</code>	How it writes. The default is "professional, consultative, confident".

PRODUCT • WHAT YOU SELL

<code>name, description, pricing</code>	One plain line each. It never promises anything that is not here.
<code>key_benefits</code>	Three to five short benefits.
<code>objection_responses</code>	Your real answer to "too expensive", "already have a solution", "not interested".

OFFER • WHAT A YES LOOKS LIKE

<code>primary / entry</code>	Your main offer, and a low-commitment first step (a free audit, a trial).
<code>goal</code>	<code>book_call</code> , <code>start_trial</code> or <code>get_reply</code> .
<code>booking_method</code>	<code>calendar_link</code> , <code>suggest_times</code> or <code>ask_preference</code> . Plus <code>booking_url</code> , <code>meeting_duration</code> ("15 minutes") and <code>meeting_owner</code> .

// 08 • TEACH IT YOUR PRODUCT

One command, then edit in English.

Harvey reads your website and writes its own notes about what you sell. You then shape how it sells by editing plain text files. No code.

```
harvey train https://your-company.com
```

WHAT IT WRITES

- ✓ **harvey.local.yaml** your settings (page 07).
- ✓ **skills/product_knowledge.md** what you sell, benefits, pricing, the pain you solve.
- ✓ **skills/competitive_intel.md** notes per competitor, when it finds any.

Reads up to 100 pages by default. **harvey train https://your-company.com 50** stops at 50.

THE SKILLS FOLDER

Harvey's sales know-how is a folder of Markdown files in **skills/**. Before an agent runs, the files it needs are pasted into its prompt. Change a file and the next cycle behaves differently. No restart.

email_frameworks

signal_playbook

objection_handling

lead_qualification

sales_methodology

offer_strategy

prospecting_tactics

account_navigation

linkedin_outreach

WHEN SOMETHING IS OFF, EDIT THIS

Emails feel pushy

skills/email_frameworks.md. It already bans lines like "I hope this finds you well".

Bad answer to an objection

skills/objection_handling.md. Add the answer you would really give.

Wrong facts about you

skills/product_knowledge.md and your settings file.

Change the writer's rules

prompts/writer.md. The agent prompts are plain Markdown too.

EASIEST WAY TO EDIT

Open **claude** in the harvey folder and say it in plain words: "Make the emails in **skills/email_frameworks.md** more casual."

// 09 • YOUR IDEAL CUSTOMER

You decide what a good prospect is.

Harvey can collect 23 facts, called signals, about a business. It collects none of them until you say yes. This is the step that matters most.

1 • DESCRIBE THEM IN THE SETTINGS FILE

```
icp:
  industries: ["..."]
  company_size: "10-200 employees"
  titles: ["..."]
  geography: ["United States"]
  hiring_signals: []
```

hiring_signals are job titles that say a company is buying right now. Empty means it uses **titles**.

2 • CONFIRM THE SIGNALS

harvey signals

See the whole list.

harvey signals --confirm free

Turn on the 21 that cost nothing.

harvey signals --confirm SERP_RANK

Opt in to a paid one by name.

harvey signals --reject CODES

Turn some off again.

The screenshot shows the 'Signals' tab in the Harvey dashboard. It lists several signal categories with their current status and options to confirm or skip:

- Likely the owner** (LIKELY_OWNER): Registry indicators suggest this person owns the business rather than working there. Status: Free (public registry API) Confirmed. Turn off.
- Confirmed in a public registry** (REGISTRY_VERIFIED): The person was confirmed in an authoritative public registry (licensing board, professional registry). Also filters out scraping artifacts — a name that matches nothing usually wasn't a person. Status: Free (public registry API) Confirmed. Turn off.
- Contactability** (can you reach them): Whether the address will actually deliver, and what to do when it won't. Status: Confirm all 3 Skip all.
- Contact form available** (CONTACT_FORM_URL): A contact form on the site. Worth knowing because it reaches the business without needing an email address at all — and roughly half of domains can't be email-verified. Status: Free (calls HTML) Seen on 3 company so far Waiting on you. Confirm Skip.
- Company email pattern** (EMAIL_PATTERN): The domain's address format (first.last@, first@). One real address cracks the whole company. Status: Free, so it's looking good! Waiting on you. Confirm Skip.
- Email deliverability** (EMAIL_STATUS): Whether the address is verified, catch-all/sky, an unverified guess, or invalid. Status: 3 verification codes (Free times available) Waiting on you. Confirm Skip.

The Signals tab: confirm or skip each one. Screenshot from the Harvey repo (docs/dashboard.gif).

SIGNALS WORTH KNOWING

NO_WEBSITE

Listed, has a phone, no site.

RUNNING_GOOGLE_ADS

Spending on ads today.

INCUMBENT_AGENCY

Who built their site.

NO_ONLINE_BOOKING

Leads have to call in.

SERP_RANK

Their search rank (paid).

3 • BUILD A COHORT

In the dashboard's Signals tab, the cohort builder turns confirmed signals into a target list: what a prospect **must have** and what **rules them out**, counted live. For example: running Google Ads, and no online booking. Now every email has a reason behind it.

// 10 • FIND BUSINESSES

See the price before it spends.

Discovery is the only step that can cost money, so Harvey shows the bill first and calls nothing until you say go.

```
harvey discover --providers
```

Every source, with real prices.

```
harvey discover --estimate
```

The projected spend, then it stops.

```
harvey discover
```

Go, on the free OpenStreetMap source.

```
harvey discover --provider dataforseo_listings --max-spend 2.00
```

A paid source with a \$2 hard cap.

```
harvey discover --city "Denver, CO;Dallas, TX"
```

Pick cities. The default is your geography.

osm

Free, no account. Thin for trades with no storefront: under 2,000 roofers in the whole US.

dataforseo_listings

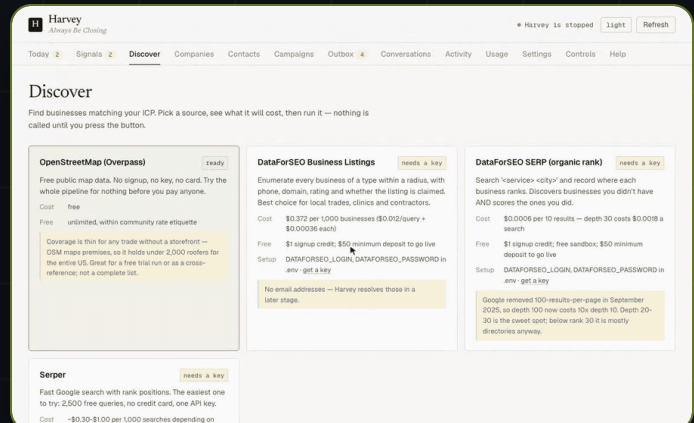
\$0.372 per 1,000. Can find businesses with no website.

dataforseo_serp

\$0.0018 a search. Rank as the buying signal.

serper

\$0.30 to \$1.00 per 1,000. 2,500 free.



The Discover tab: sources side by side, then a costed run. Screenshot from the Harvey repo (docs/dashboard.gif).

```
--max-spend
```

Hard cap in dollars. Default **1.00**.

```
--depth
```

How deep into search results. Default **30**. Stay at 20 to 30: since Google dropped 100 results per page in September 2025, depth 100 is billed as ten pages.

```
--no-profile
```

Skip reading the sites right after. Reading is free, so leave it on.

// 11 • AFTER IT FINDS THEM

From a name to an address you can use.

Four stages. Each runs on its own, can run again safely, and states its cost.

01 • PAID OR FREE

Discover

Who exists in your market.



02 • FREE

Profile

Reads the homepage, robots.txt, sitemap.xml, team and careers pages.



03 • FREE FIRST

Enrich

Who decides, checked against public registries.



04 • CHECKER

Verify

Can you actually reach them.

WHAT PROFILE PULLS OUT, FOR FREE

- ✓ **The agency that built the site**, from the credit in their footer. Weak matches are not saved.
- ✓ **Ad pixels**, so you know they spend on Google or Meta.
- ✓ **Missing schema, a stale blog**, no online booking.
- ✓ **Open jobs and named people.**

EVERY ADDRESS GETS AN HONEST TAG

verified	Checked. Gets sent.
risky	Catch-all domain. Not sent unless you set <code>send_to_risky: true</code> .
guess	Never sent.
invalid	Never sent.

Harvey learns each company's address format, then checks one address instead of guessing six.

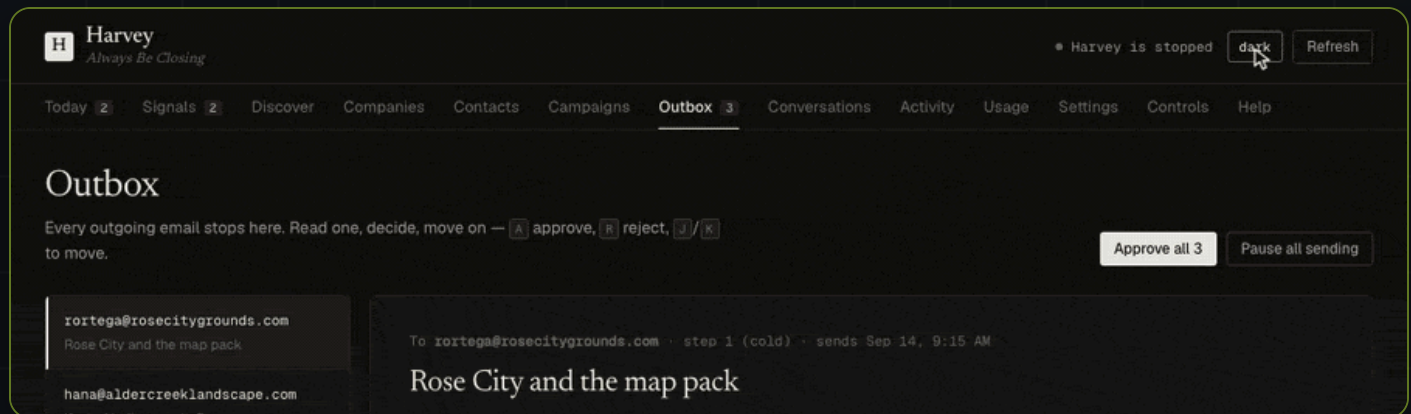
USEFUL EVEN IF YOU NEVER LET IT SEND

<code>harvey profile</code>	Read found sites now: up to 200 a run, re-read after 90 days.
<code>harvey export</code>	Sendable prospects (verified, risky) to prospects.csv.
<code>harvey export --all</code>	Everything it found, no filters.
<code>harvey export --min-score 7</code>	Only prospects scored 7 or more against your ideal customer.

// 12 • THE OUTBOX

Nothing sends until you say so.

By default every email waits for your approval. Read one, decide, move to the next. That is on purpose: a wall of drafts invites one lazy "approve all".



The Outbox: one email at a time. Keys: A approve, R reject, J and K to move. Screenshot from the Harvey repo (docs/dashboard.gif).

FROM THE TERMINAL

```
harvey outbox
```

Review what is queued.

```
harvey outbox --approve ID
```

Approve one email by its ID.

```
harvey outbox --reject ID
```

Reject one.

```
harvey outbox --approve-all
```

Approve everything pending. Use with care.

```
harvey sending pause
```

Kill switch: stops all sending. `harvey sending resume` turns it back on.

CHECKED BEFORE SENDING

Plain code, no AI, blocks: unfilled merge tags, banned phrases, emails over the length cap, too many links, HTML bodies, bad addresses, and a recipient that does not match the record.

NO EDIT BUTTON

The Outbox approves or rejects. If a draft is wrong, reject it and fix the cause in your skills or settings file.

FULL AUTOPILOT

Set `require_approval: false` under `channels: email:`. Only after weeks of drafts you would have sent yourself.

// 13 • TURN IT ON

Start the loop and open the dashboard.

Two Terminal windows: one runs Harvey, one runs the dashboard. Activate the venv in both.

harvey run

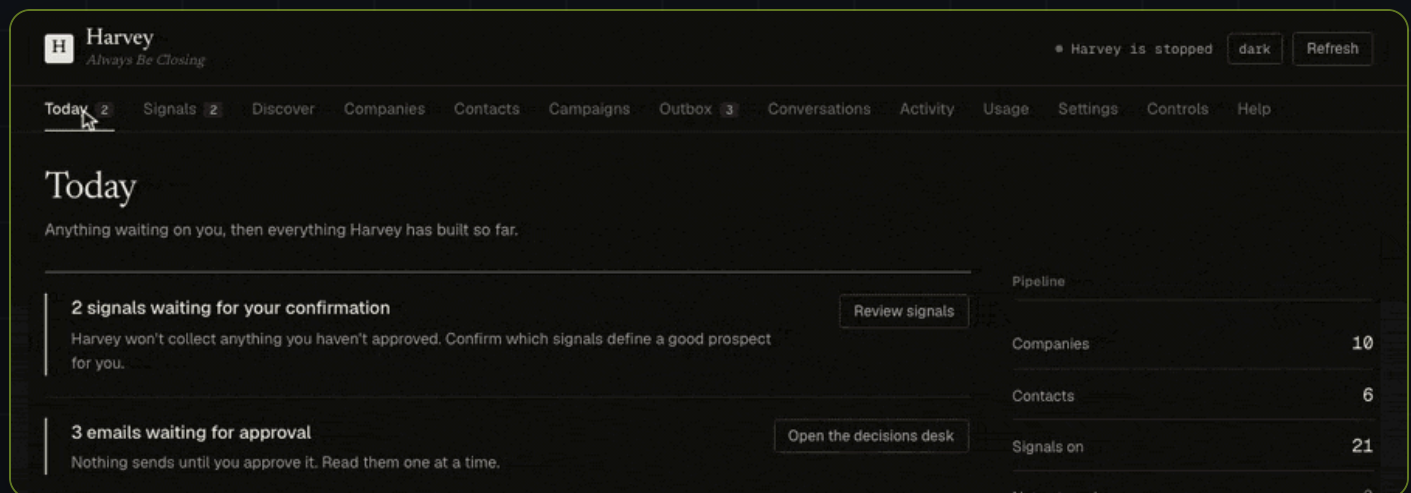
Starts the loop. Ctrl+C stops it.

harvey dashboard

The web view at localhost:5555.

harvey status

A pipeline summary in Terminal.



The Today screen: what waits on you, then the pipeline. Screenshot from the Harvey repo (docs/dashboard.gif).

EACH CYCLE, EVERY 15 MINUTES

Wake up, skip if it is quiet hours, skip if the plan budget is used, pick the job, do it, log it, sleep. The pick is a fixed order, not an AI guess:

replies > send > write > prospect
> analyze

FIVE AGENTS UNDER ONE NAME

Scout Scores and personalizes prospects.

Writer 3 emails: under 75, 75 and 40 words.

Sender Queues and paces, under your cap.

Handler Reads and sorts the replies.

Analyst Stats on quiet cycles.

// 14 • WHEN THEY REPLY

Someone wrote back. Now what?

Each cycle the Handler reads new replies, sorts them, and drafts an answer when one is called for. Those drafts go to the same Outbox for your approval.

interested	Drafts a short reply that moves toward a meeting.
objection	Acknowledges it, gives one proof point, asks one question.
question	Answers it and ties it back to their business.
wrong_person	Thanks them and asks who the right person is.
not_interested	No reply. The conversation is closed. One no is enough.
unsubscribe	No reply, ever. Suppressed for good, in any wording.
escalate	Angry, legal or compliance talk. No reply. Flagged for you to handle.
ooo	Out of office. No reply; it follows up later.
a bounce	Address marked invalid, its queued emails cancelled.

EVERY CONVERSATION MOVES THROUGH STAGES

initial_outreach > engaged > qualifying > presenting > negotiating > closing >
closed_won / closed_lost

ABOUT BOOKING

Harvey does not put meetings on your calendar yet. Calendar auto-booking is on its roadmap, and the calendar code in 0.3.0 is a placeholder. Today, replies propose times and you book the call.

WHAT I WOULD DO

Check the Conversations tab every day. When a lead says yes, take the thread yourself from your mailbox and send your own calendar link.

// 15 • BUDGET AND LIMITS

Set the limits before you start.

These live in your settings file. The defaults are safe. The two you should change on day one are the timezone and the daily send number.

```
usage:
  max_daily_claude_percent: 80
  heartbeat_interval_minutes: 15
  quiet_hours: {start: "22:00", end: "07:00", timezone: "America/New_York"}
channels:
  email: {max_daily_sends: 50, require_approval: true,
          send_to_risky: false, max_bounce_rate: 0.05}
```

max_daily_claude_percent The most of your plan's quota Harvey may use. 80 leaves room for your own Claude work. Same setting for Codex.

heartbeat_interval_minutes How often it wakes up. Default 15.

quiet_hours When it sleeps. Set **timezone** to yours, or it works New York hours.

max_daily_sends A ceiling, not a target. Start at 10 to 20 a day per inbox (page 16).

require_approval **true** keeps every email in the Outbox for you.

send_to_risky **false** skips catch-all addresses. Safest.

max_bounce_rate **0.05** : past 5% bounces, all sending pauses.

linkedin **max_daily_connections: 20** , **max_daily_messages: 10** . Only runs if LinkedIn login is in **.env** . Set **enabled: false** to be sure.

SEE WHAT IT USED

harvey usage shows your plan's quota and tokens per agent for the last 30 days. No dollar figures: a plan is not billed per token.

IT IDLES ALL DAY?

It is probably quiet hours in the wrong timezone, or it hit its quota share. **harvey status** says which.

// 16 • LEGAL AND DELIVERABILITY

You are the sender. Act like it.

Harvey writes and sends, but the email goes out in your name. Cold email is legal in most places when done right, and expensive when done wrong: CAN-SPAM penalties go up to \$53,088 per email.

THE LAW, IN PLAIN WORDS

- ✓ **US, CAN-SPAM:** a true subject line, a real from address, a working opt-out, and your physical mailing address in the footer.
- ✓ **EU and UK:** a real reason this person would care, knowing where the data came from, and an easy way to object.
- ✓ **If they ask "is this AI?",** Harvey is told to say yes. Never change that.
- ✓ **LinkedIn:** automation breaks their terms. Off unless you add a login.

WARM UP OR BURN OUT

1. Buy a **separate sending domain:** getacme.com, not acme.com.
2. Set up **SPF, DKIM and DMARC** on it. Miss one and Gmail junks you.
3. **Warm it up for 2 to 4 weeks** before real volume.
4. **Ramp slowly:** 10 to 20 a day per inbox, then about 5 more a day.
5. **Watch bounces.** Above about 3%, stop and clean the list.

DO THIS BEFORE YOUR FIRST SEND: YOUR MAILING ADDRESS

The repo says to put your physical mailing address in the footer before your first campaign. I could not find a setting for it in Harvey 0.3.0, and the reply drafts are written with no signature. So open **cClaude** in the harvey folder and ask: **"Add my mailing address [your address] to the bottom of every email Harvey sends."** Then check a draft in the Outbox before you approve anything.

OPT-OUTS ARE AUTOMATIC

Any opt-out wording ("stop", "remove me") is treated as an unsubscribe, right away and for good.

NOT LEGAL ADVICE

Sending at scale or into a regulated industry?
Talk to a lawyer first.

// 17 • THE CHATGPT OPTION

Pay OpenAI instead? Use Codex.

Claude is the default and needs no change. If you would rather use a ChatGPT plan, Harvey can think through the Codex command line instead. Still a plan, never a per-token bill.

```
npm install -g @openai/codex@0.159.3
codex login
```

At login, choose **"Sign in with ChatGPT"**. API-key logins are refused.

THEN TELL HARVEY, ONE OF THREE WAYS

```
brain:
  provider: codex
  model: gpt-5.5
  reasoning_effort: ""
```

harvey setup

Pick codex; it suggests gpt-5.5.

```
harvey train <url> --provider codex --model
gpt-5.5
```

Train with Codex.

harvey status --check

Checks Codex without using your plan.

WHAT TO KNOW

- ✓ **Exactly Codex 0.159.3.** Any other version, newer included, is refused.
- ✓ **Model gpt-5.5.** Leave it blank and it fails on current accounts.
- ✓ **Mac or Linux only.** Not Windows, not the Docker image.
- ✓ **One or the other.** It never falls back to Claude or an API key.
- ✓ **Your own Codex setup is left alone.** Each call runs isolated, with no tools.
- ✓ **Logins expire.** About every 8 days, use Codex once or run `codex login`.

IF IT PAUSES

When Codex cannot be used, Harvey skips whole cycles instead of guessing, and `harvey status` says why. Fix the cause (usually `codex login`) and it picks up on its own.

// 18 • TROUBLESHOOTING

When it breaks, start here.

The fixes for the problems you are most likely to hit, straight from the repo's own notes.

command not found: harvey

Run `source .venv/bin/activate` first.

SyntaxError or odd
ImportErrors (Mac)

Your venv is Python 3.9. Check with `.venv/bin/python -V`, then rebuild:
`rm -rf .venv && python3.13 -m venv .venv && source .venv/bin/activate && pip install -e .`

No module named 'harvey'
(Mac)

Run `harvey install` again. It fixes a hidden-file flag Python 3.13 trips on.

externally-managed-
environment

You are on system Python. Use the venv.

Claude calls fail

`claude login`, and check your plan is active. Test with
`claude -p "say hi"`.

Discovery finds nothing

Confirm signals first: `harvey signals --confirm free`. The free map source is thin for service trades, and its volunteer servers can throttle: see `harvey discover --providers`.

Emails land in spam

Almost always the domain, not the copy. Check SPF, DKIM, DMARC, the warm-up, and halve your volume.

Does nothing during the day

Check `quiet_hours` and `max_daily_claude_percent`. `harvey status` shows the state.

Stop it right now

`Ctrl+C`, or `harvey sending pause` to stop email and keep the loop. It resumes cleanly.

Codex calls fail

Read the log line: each one says what to do. Usually `codex login` or `brain.model: gpt-5.5`.

WHERE YOUR DATA LIVES

All on your computer: `data/harvey.db`, `.env` and your settings file. Nothing goes anywhere except the services you set up.

// 19 • THE CHEAT SHEET

Every command, one page.

Screenshot this one. Run them from inside the harvey folder with the venv on.

SET UP

```
git clone https://github.com/ethanplusai/harvey.git
```

Get the code

```
python3.13 -m venv .venv && source .venv/bin/activate && pip install -e .
```

Install

```
source .venv/bin/activate
```

Every new window

```
harvey setup
```

Setup wizard

```
harvey gmail auth • harvey gmail test
```

Connect Gmail

TEACH AND TARGET

```
harvey train https://your-company.com
```

Learn your product

```
harvey signals --confirm free
```

Turn on free signals

```
harvey discover --providers • --estimate
```

Prices, then a dry run

```
harvey discover
```

Find businesses (free)

RUN AND REVIEW

```
harvey run
```

Start the loop

```
harvey dashboard
```

localhost:5555

```
harvey outbox • --approve ID • --reject ID
```

Approve email

```
harvey sending pause • resume
```

Kill switch

```
harvey status • harvey usage
```

State and quota

```
harvey export
```

Prospects to CSV

THE TWO FILES

`.env` = keys. `harvey.yaml` = settings, unless `harvey.local.yaml` exists: then that one wins.

THE REPO

github.com/ethanplusai/harvey
Harvey is built by Ethan Rogers (ethanplusai), MIT License.

// 20 • WHAT NEXT

Harvey finds the buyers. Here is the rest.

I use AI to build and run lead generation businesses. If you want to do the same, there are two ways to work with me.

OPTION 1 • THE COMMUNITY

Join my Skool community

Pay Per Lead Academy

Stop chasing clients. Start building a lead generation business.

- Pick a niche
- Run Meta and Google ads
- Find lead buyers and price your leads
- Automate delivery and tracking



Join on Skool →

skool.com/pay-per-lead-academy-3593

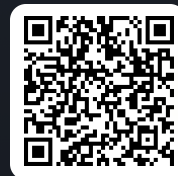
OPTION 2 • DIRECT

Book a call with me

1 on 1 with Avi Grondin • 60 minutes

One hour. Your business. My full attention.

- A deep dive into your specific business
- Your niche, your ads, your lead buyers
- A straight read on your numbers
- Your next best moves



Book your call →

Tap the button or scan the code

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