FREE GUIDE · CLAUDE CODE + HARVEY

Harvey: Your Free AI Sales Team

The complete setup guide for Harvey, the open-source AI sales agent from my reel. It finds your ideal customers, reads their websites, finds the decision maker, writes and sends cold email, follows up, answers replies and pushes every conversation toward a meeting. This guide shows you how to set it up the right way.



THE REPO

github.com/ethanplusai/harvey

Open source · MIT licence · 3.8k stars

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Harvey runs on the Claude subscription you already pay for. No API keys for the AI, no per-token bill. Set it up once and it works for you every 15 minutes.

How Harvey works

1

Find

Harvey discovers businesses that match your ICP (from OpenStreetMap for free, or Google Maps and Google Search through cheap providers), reads their websites and records signals like **running Google Ads** or **no online booking**.

2

Reach

It finds the owner or decision maker, verifies their email, and writes a short, specific 3-email sequence that mentions what it found. Every email waits for your approval.

3

Close

It reads replies, stops the sequence the moment someone answers, drafts a reply for objections and questions, and sends your booking link to people who want to talk.

Is it really free?

Harvey itself is free and open source (MIT licence). The AI runs on your Claude Pro or Max plan through Claude Code, or on a ChatGPT plan through Codex. What you still need: a sending mailbox on its own domain (a few dollars a month), and optionally an email verifier and a data provider, which all have free tiers. Calendar auto-booking is on Harvey's roadmap: today it books meetings by sending your Calendly or cal.com link.

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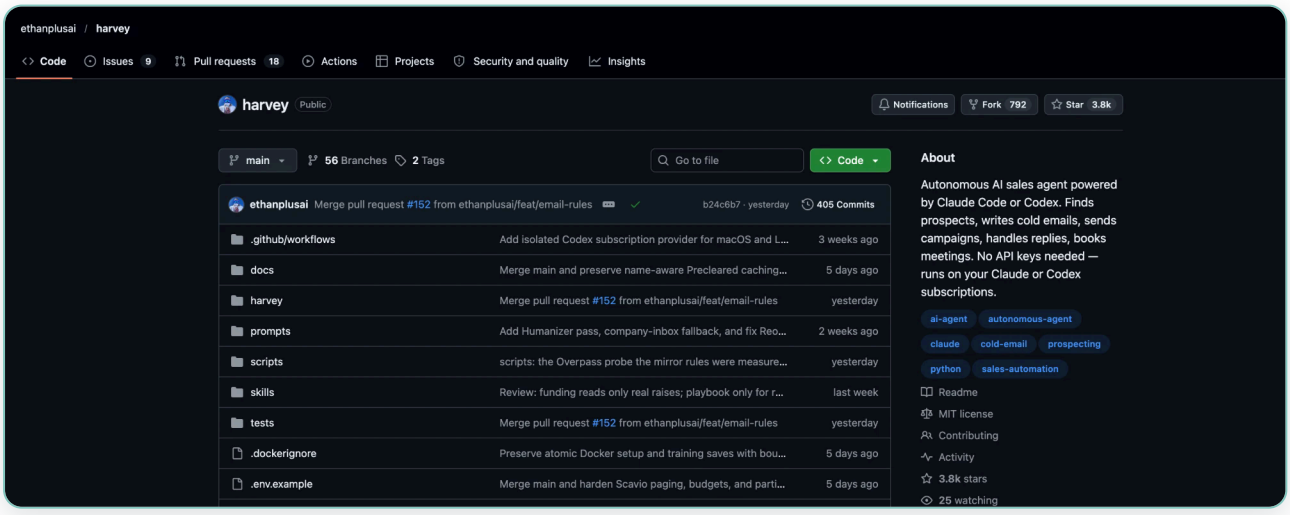
What you need

Get these ready before you start. Only the first three are required to try Harvey.

What	Why	Cost
Claude Pro or Max	The brain. Harvey calls Claude Code in the background.	Plan you already have
Python 3.11 or newer	Harvey is a Python app. On a Mac: `brew install python@3.13` .	Free
A sending domain + mailbox	A second domain (getyourbrand.com) with Google Workspace, Microsoft 365 or any SMTP mailbox. Never your main domain.	About $10 domain + $7/month mailbox
Warmup service	Warms the new mailbox for 2 to 4 weeks so you land in the inbox. Harvey recommends TrulyInbox.	Paid, from Starter plan
Email verifier	Checks an address exists before sending. Reoon (600 free a month) or ZeroBounce (100 free).	Free tier
Data provider (optional)	OpenStreetMap is free and built in. For Google Maps data: DataForSEO, Scavio or Serper.	Free tiers, then cents per 1,000
Calendly or cal.com link	The page Harvey sends when someone wants a meeting.	Free

The repo



github.com/ethanplusai/harvey

Everything is in the repo: the code, a `CLAUDE.md` that turns Claude Code into a setup wizard, the sales playbooks in `skills/` and a fully commented `.env.example` . Star it so you get updates.

Fastest setup: let Claude do it

The repo ships with instructions for Claude Code. Open the folder in Claude and it becomes your setup wizard. This is the way I recommend.

1 · IN TERMINAL

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

2 · PASTE THIS INTO CLAUDE (FILL THE BRACKETS)

```
Set up Harvey for me.

My business: [your company name and website]
What I sell: [your product or service, and the price]
My ideal customer: [industry, company size, city or country, job titles]
Good signs they need me: [e.g. running Google Ads, no online booking, hiring]
Sending mailbox: [Gmail / Google Workspace / Microsoft 365 / SMTP]
Booking link: [your Calendly or cal.com link]
My postal address for the email footer: [address]

Keep approval mode on so no email sends without me.
Check my sending domain with harvey warmup before any campaign.
```

What Claude will do

- ✓ **It checks your machine.** Python version, the `.venv`, the `.env` file and whether Harvey has been trained yet. It picks up where you left off.
- ✓ **It installs everything.** Creates the virtual environment and installs Harvey. You approve each command.
- ✓ **It asks for your keys one at a time.** Mailbox details, then a verifier key. It tells you where to get each one.
- ✓ **It trains Harvey on your website.** Runs `harvey train` on your site so Harvey learns your product, pricing and who you sell to.

MANUAL SETUP · PART 1

Install and connect

Prefer to do it yourself? Run these in Terminal, inside the `harvey` folder.

1 Download Harvey

Clone the repo and go into the folder.

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

2 Install it

Use Python 3.13 on a Mac (plain `python3` is the old system 3.9 and will not work).

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

3 Check Claude works

Harvey uses your Claude login. If this prints a reply, you are good.

```
claude login
claude -p "say hi"
```

4 Add your keys

Copy the example file and fill it in. Every line says where to get the key. You only need a mailbox; add a verifier too.

```
cp .env.example .env
open -e .env
```

5 Connect your mailbox

For Gmail: create an OAuth "Desktop app" client in Google Cloud (Gmail API on), paste the ID and secret into `.env`, then sign in once. Microsoft 365 users run `harvey microsoft auth`.

```
harvey gmail auth
```

MANUAL SETUP · PART 2

Train, find, run

6 Train Harvey on your business

Harvey reads your website and writes `harvey.local.yaml` with your product, offer and target customer. Re-run it any time your offer changes.

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

7 Confirm what it looks for

Harvey collects nothing until you approve its signals. Start with all the free ones (26 of 29), add paid ones only when you need them.

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

8 Find businesses

Check the menu and the price first, then run it. The default source (OpenStreetMap) is free and needs no account.

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

9 Open the dashboard

Prints a private link to your local dashboard. Keep the token in that link to yourself.

```
harvey dashboard
```

10 Start the heartbeat

Every 15 minutes Harvey wakes up, handles replies, sends approved emails, writes new campaigns and prospects. Stop it with Ctrl+C.

```
harvey run
```

> **Pro tip.** You can run Harvey without ever letting it send. `harvey export` gives you a CSV of verified prospects for any other email tool.

Email done right

This is where most people fail. Harvey can write the perfect email, but a fresh domain sending 50 emails on day one lands in spam forever.

1. **Buy a separate sending domain**
   Use something like **getacme.com** or **tryacme.com**, never acme.com. If cold email hurts a domain, it should not be your main one.

2. **Set up SPF, DKIM and DMARC**
   Your mailbox provider gives you the DNS records. Without all three, Gmail sends you to spam.

3. **Warm up for 2 to 4 weeks**
   Add the mailbox to a warmup service and leave it running, even after you start. Connect it with `harvey trulyinbox connect`.

4. **Let Harvey ramp you up**
   Set the warmup start date in your config. Harvey sends no cold email for 14 days, then starts at 5 a day and adds 3 a day.

5. **Check you are ready**
   `harvey warmup` checks DNS, domain age, blocklists, warmup and bounces, then says READY or NOT READY.

6. **Watch bounces**
   Keep bounces under 3 percent. Harvey pauses all sending by itself if they pass your limit (5 percent by default).

IN HARVEY.LOCAL.YAML

```
channels:
  email:
    provider: "gmail"
    max_daily_sends: 50        # a ceiling, not a target
    require_approval: true     # keep this on at first
    warmup:
      start_date: "2026-11-02" # the day warmup started
      min_days: 14
      start_sends: 5
      daily_increase: 3
```

Your ICP and your offer

`harvey train` fills this in from your website. Open `harvey.local.yaml` and check these parts. This file wins over `harvey.yaml`.

```
product:
  offer:
    goal: "book_call"
    booking_method: "calendar_link"
    booking_url: "https://cal.com/you/15min"
    meeting_duration: "15 minutes"

icp:
  industries: ["Dental clinics", "Roofing"]
  company_size: "5-50 employees"
  titles: ["Owner", "Practice Manager"]
  geography: ["Dubai, UAE"]

compliance:
  postal_address: "Your business address"
  do_not_contact: ["competitor.com", "client.com"]
```

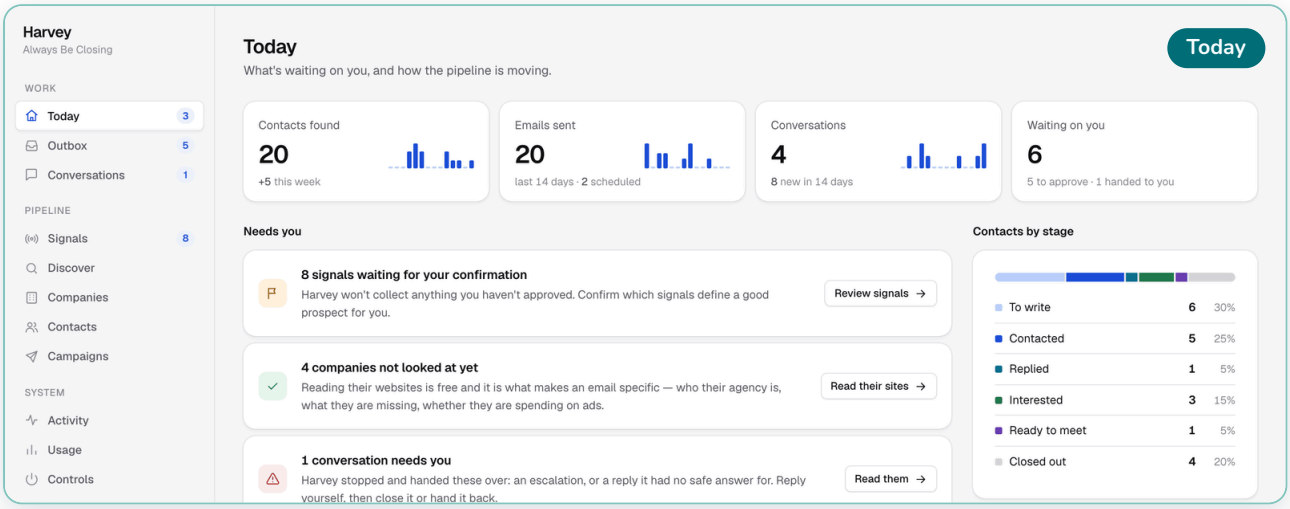
> **The booking link matters.** With `booking_method: calendar_link`, Harvey sends this link when a prospect wants to meet, so meetings land straight in your calendar.

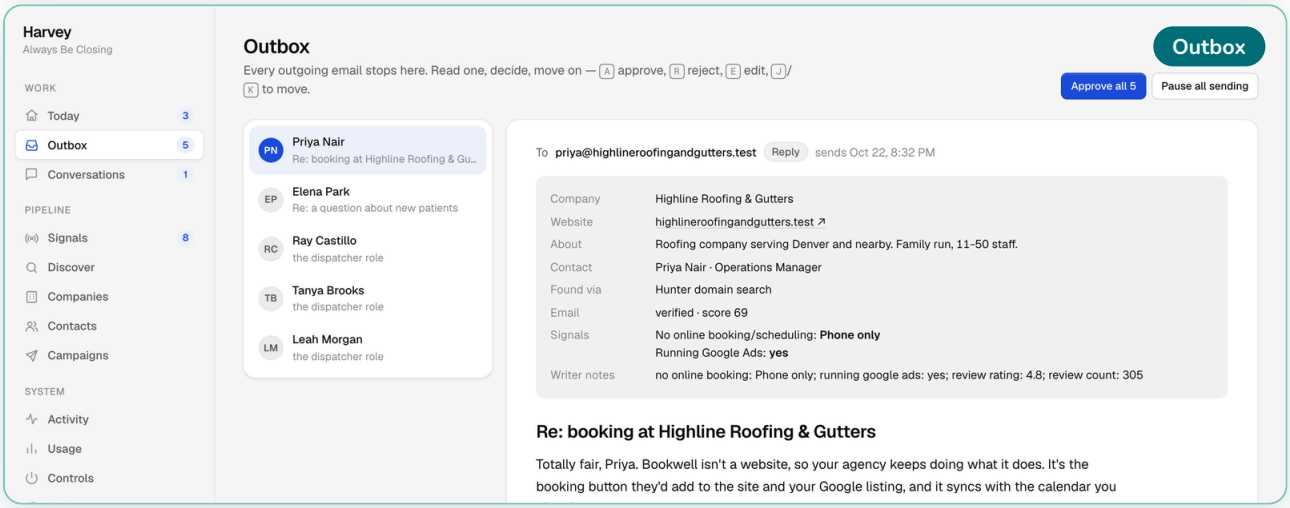
Where it finds businesses

Source	Cost	Best for
OpenStreetMap	Free, no account	Testing the whole pipeline. Thin for businesses without a storefront.
TinyFish	Free, no card	Finding businesses by phrase.
Scavio Google Maps	50 free credits, then about $0.01 a page	Google Maps listings with phone, site, rating.
DataForSEO Maps	$1 free credit, then $0.002 a search	Map rank, rating, claimed status.
Serper	2,500 free searches	Google Search, the easiest paid one to try.

The dashboard

Run `harvey dashboard` and open the link. **Today** shows what needs you; **Outbox** is where you approve emails with A (approve), R (reject), J and K (move).





Approval or autopilot

	Approval (default)	Autopilot
First emails, follow-ups, replies	Wait in the Outbox for your OK	Go out on schedule
Daily limit, warmup ramp, opt-outs, bounces	Apply	Apply
Email with a strange link or leaked instructions	You see it like any other	Held for you, marked Held

Approve a batch or two by hand first. Then switch in Settings → Sending, or set `require_approval: false`. Turning it off again is one click.

Commands, all in one place

Command	What it does
`harvey run`	Start the 15-minute heartbeat loop
`harvey dashboard`	Open the dashboard (add --url to print the link again)
`harvey train <url>`	Learn your product from your website
`harvey signals`	Review and confirm what Harvey looks for
`harvey discover`	Find businesses (--providers, --estimate)
`harvey profile`	Read discovered companies' websites (free)
`harvey status`	Pipeline summary (--check tests Claude without a prompt)
`harvey outbox`	Review queued emails (--approve-all)
`harvey sending pause`	Kill switch: stop all sending now (resume to restart)
`harvey warmup`	Is the sending domain ready?
`harvey trulyinbox connect`	Let Harvey read your warmup progress
`harvey gmail auth`	One-time Gmail sign-in
`harvey microsoft auth`	One-time Microsoft 365 sign-in
`harvey usage`	Claude quota used, per agent
`harvey export`	Verified prospects to a CSV for any other tool
`harvey retry-writes`	Retry prospects the Writer gave up on

The five agents inside Harvey

Scout
Scores and personalises prospects

Writer
Writes 3-email sequences under 75 words

Sender
Paces sends, stops on reply

Handler
Reads replies, opt-outs and bounces

Analyst
Finds what is working on quiet cycles

Common problems and fixes

command not found: harvey

Activate the environment first: `source .venv/bin/activate`.

Odd errors right after install

Your venv is Python 3.9. Rebuild it: `rm -rf .venv`, then repeat step 2 with `python3.13`.

Claude calls fail

Run `claude login`, test with `claude -p "say hi"`, and `claude update` if a flag is missing.

Discovery finds nothing

Confirm signals first (`harvey signals --confirm free`). On OpenStreetMap, try a paid provider for trades without a storefront.

Emails land in spam

Almost always the domain, not the words. Check SPF, DKIM and DMARC, keep warming up, halve your volume.

Harvey does nothing all day

Check quiet hours and `max_daily_claude_percent`. `harvey status` shows why.

Dashboard says locked

Open the exact link `harvey dashboard` printed, on 127.0.0.1 or localhost.

Stop everything now

`harvey sending pause` stops sending and keeps the loop running. Ctrl+C stops Harvey.

Play it safe

- ✓ You are the sender. Set your postal address and keep the opt-out line in every cold email.
- ✓ Add competitors and current clients to `do_not_contact` before the first campaign.
- ✓ Leave LinkedIn automation off. It breaks LinkedIn's terms and can get the account banned.
- ✓ If someone asks whether they are talking to an AI, Harvey answers truthfully. Keep it that way.

Your turn

Start in approval mode, read the first 20 emails Harvey writes, and edit the files in `skills/` until they sound like you. Then let it run. Comment HARVEY on the reel if you get stuck and I will help.

Atheef Abdul Rahman · Ailutions