MADEEASY GUIDE

Designing, building, changing and testing processes

A step-by-step guide to MadeEasy, from finding your way around to taking a process live.

MadeEasy by AgenticAuto

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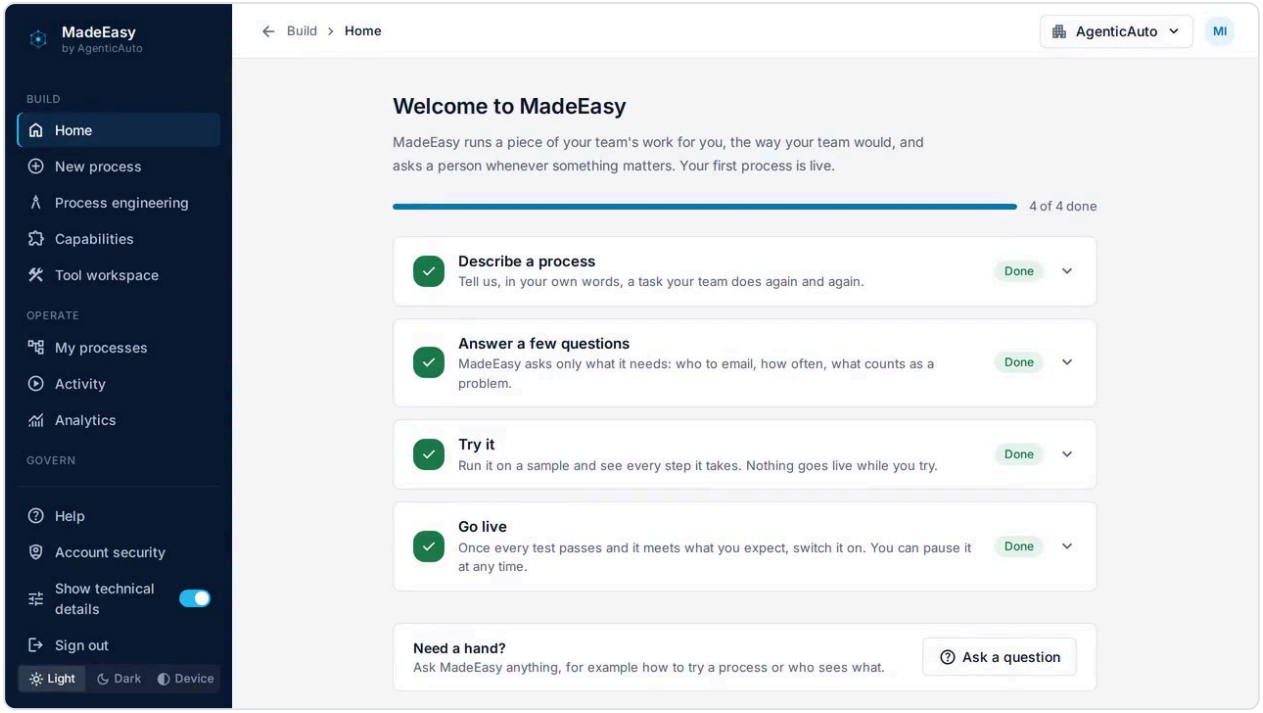
CHAPTER 1

Finding your way around MadeEasy

Every part of the platform, and what it is for.

01

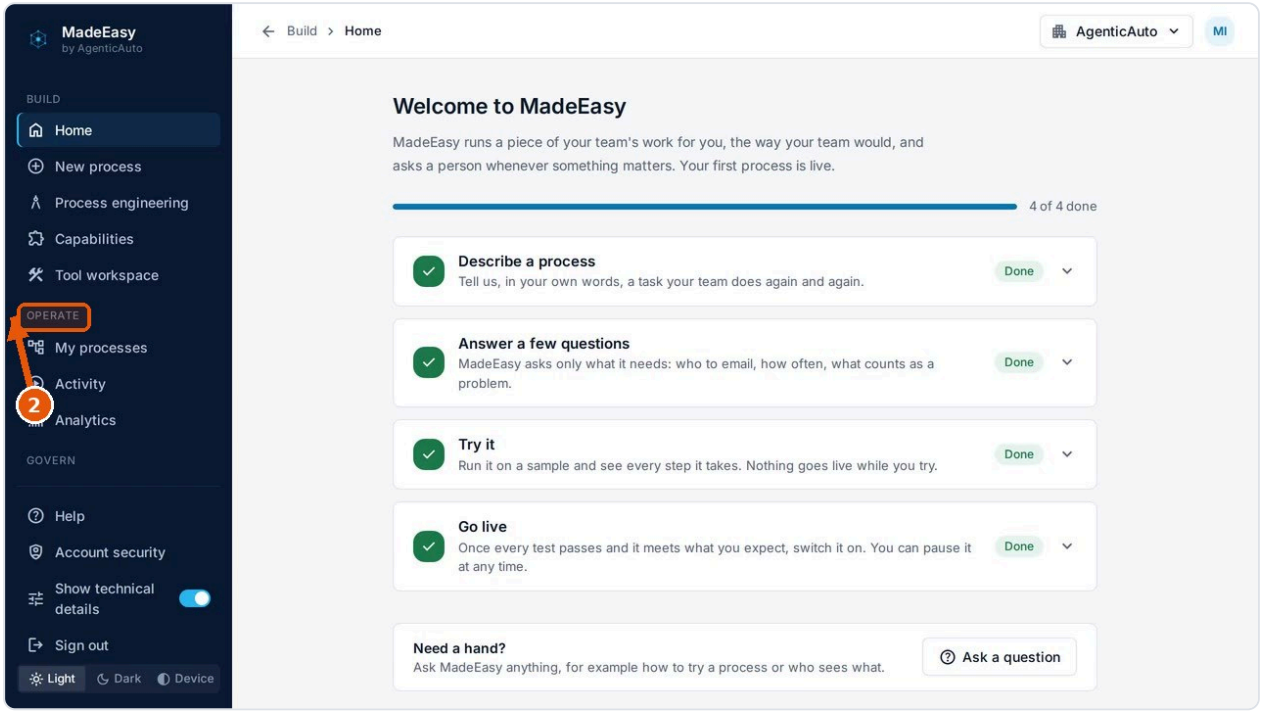
This is MadeEasy. In the next few minutes, we will visit every part of it, so you know where to find what you need.



02

The menu on the left has three groups. Build is where processes are made. Operate is where they run. Govern is where you keep control.

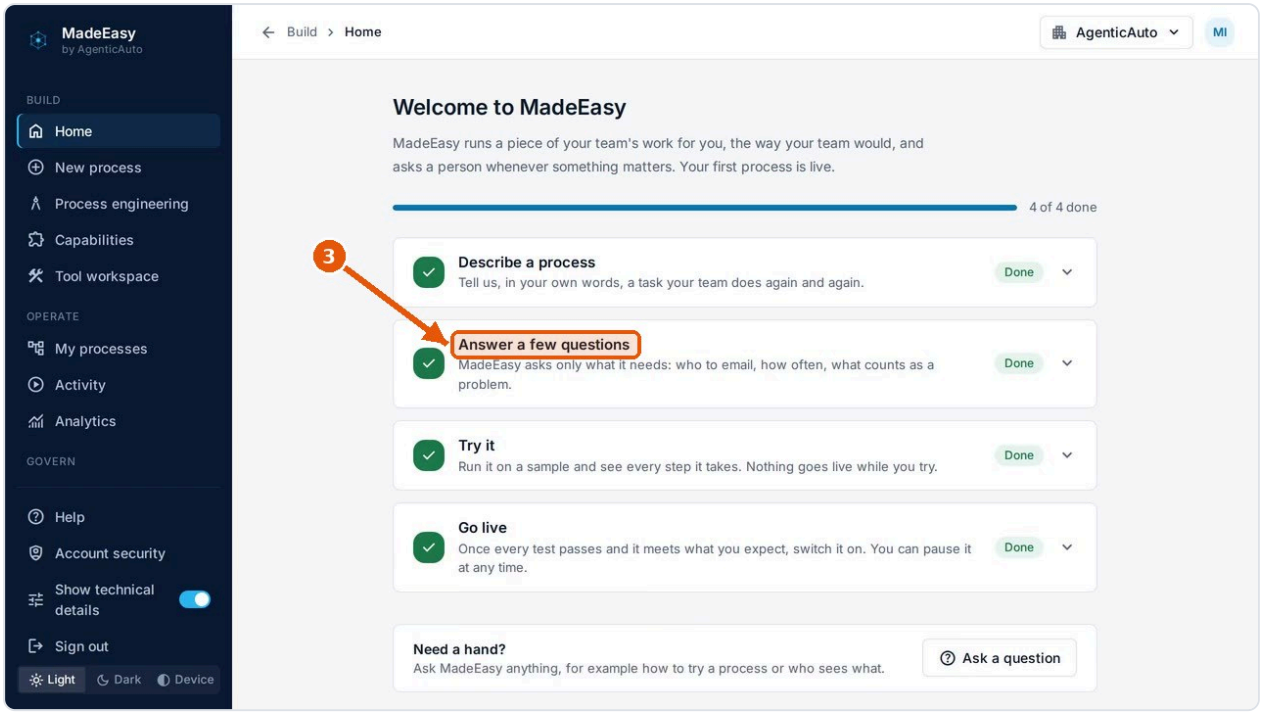
Look for **Operate**, marked 2 on the screen.



03

We start at Home. It walks you to your first process in four steps: describe it, answer a few questions, try it, and go live.

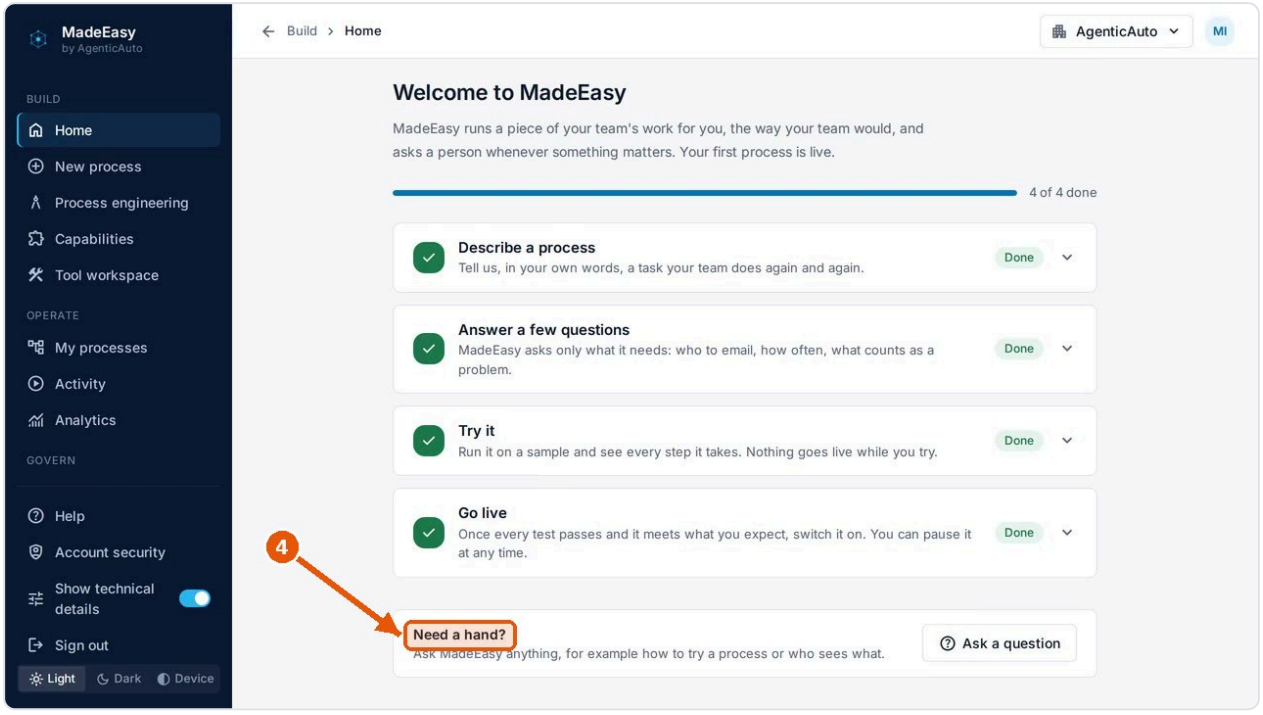
Look for **answer a few questions**, marked 3 on the screen.



04

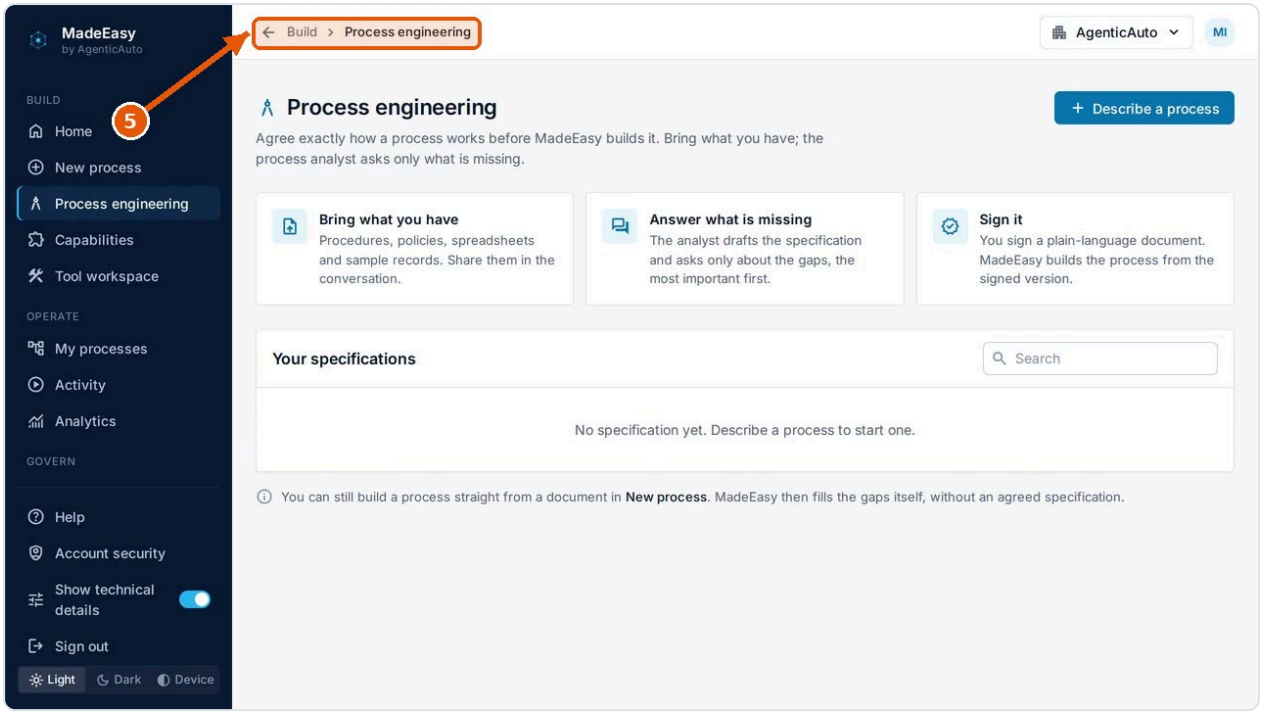
Whenever you need a hand, ask MadeEasy a question from here, in your own words.

Look for **need a hand**, marked 4 on the screen.



05 Under Build, Process engineering is where you and the process analyst agree how a process works, in your own words, before anything is built.

Look for **Build Process engineering**, marked 5 on the screen.

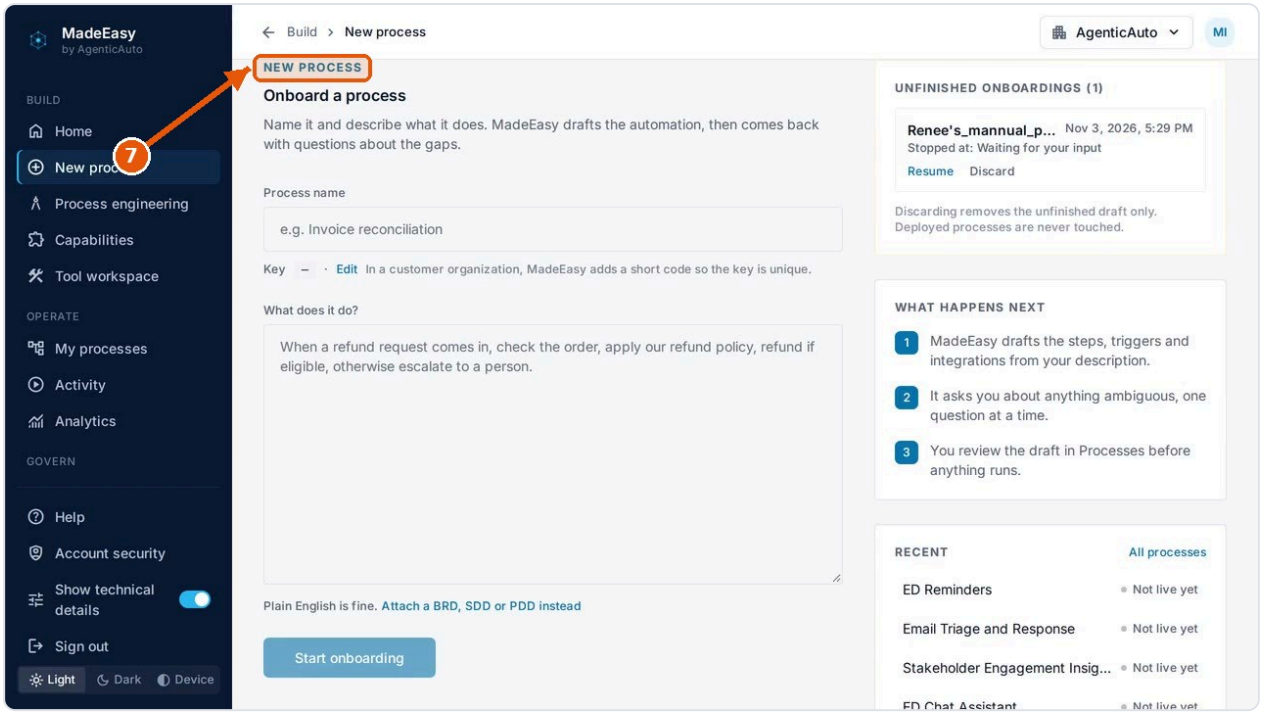


06 Each specification you start is kept here, with its conversation, its versions and its sign-off.

07

New process builds a process from a signed specification. You can also start straight from a document, and MadeEasy will ask what it leaves open.

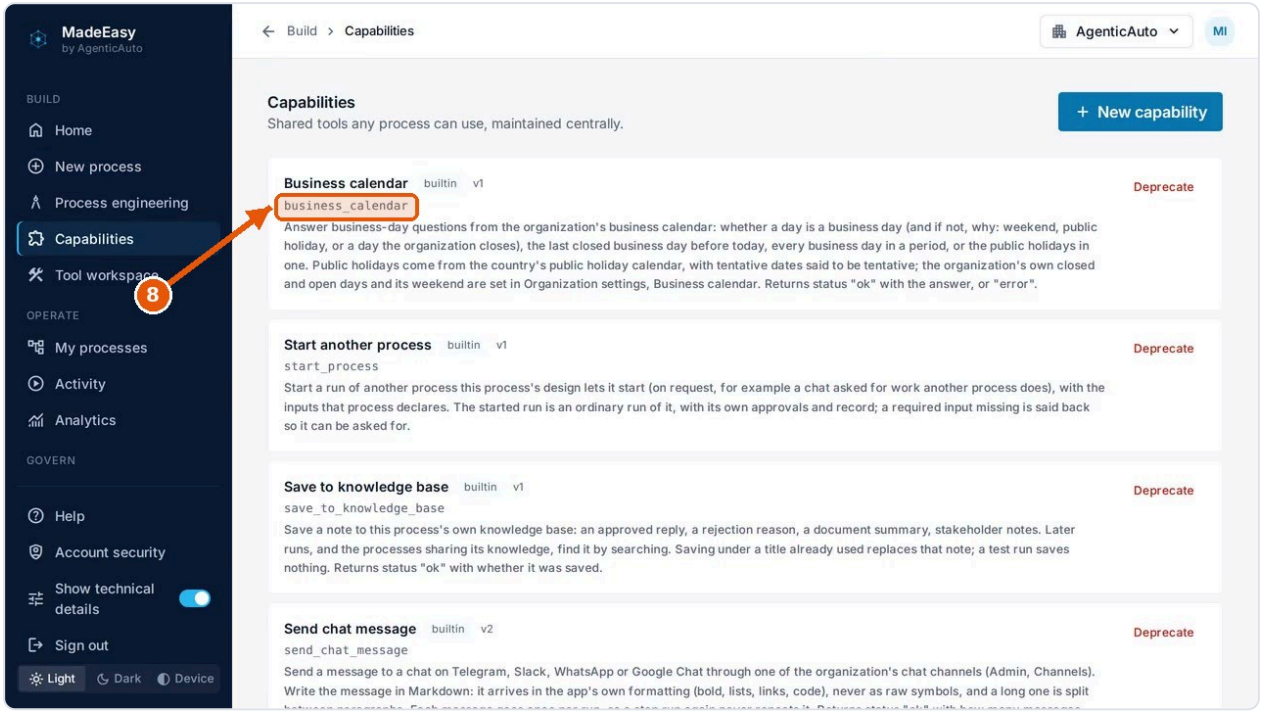
Look for **New process**, marked 7 on the screen.



08

Capabilities are the shared tools every process can use: the business calendar, sending email, starting another process, saving to a knowledge base.

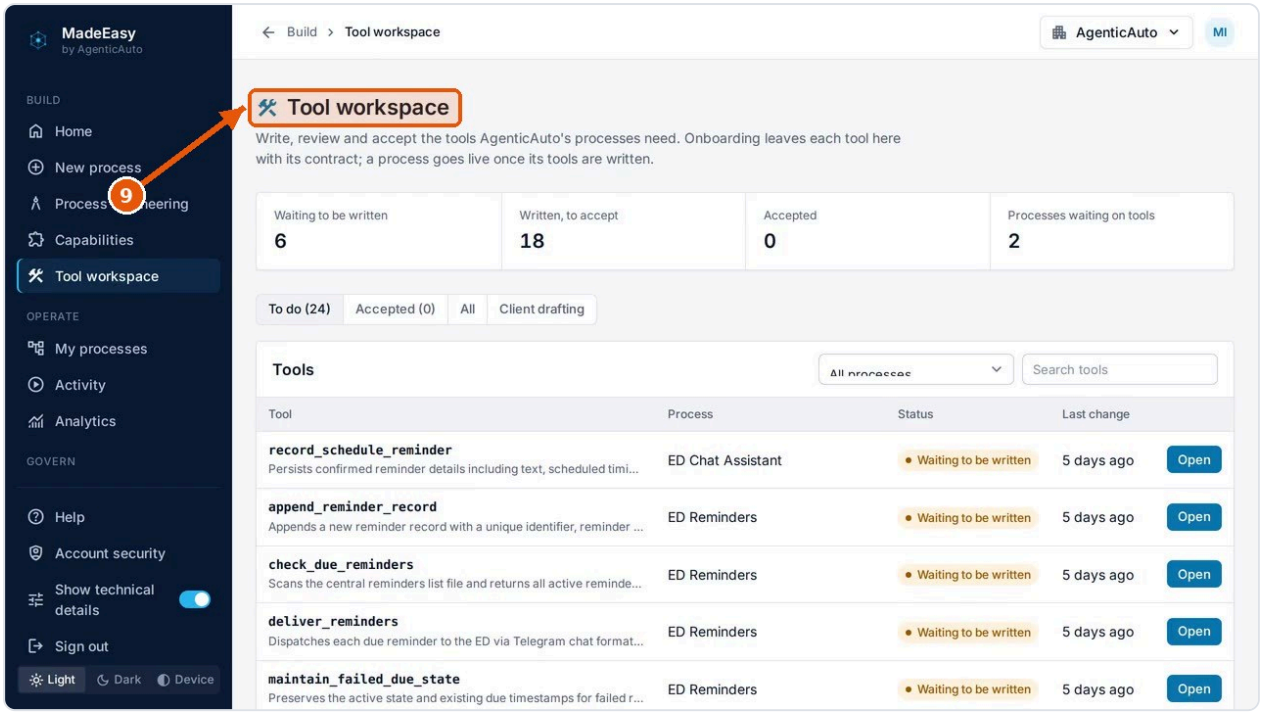
Look for **business calendar**, marked 8 on the screen.



09

The Tool workspace is where the tools a process needs are written. Each one is reviewed and tested on your own cases before it is accepted.

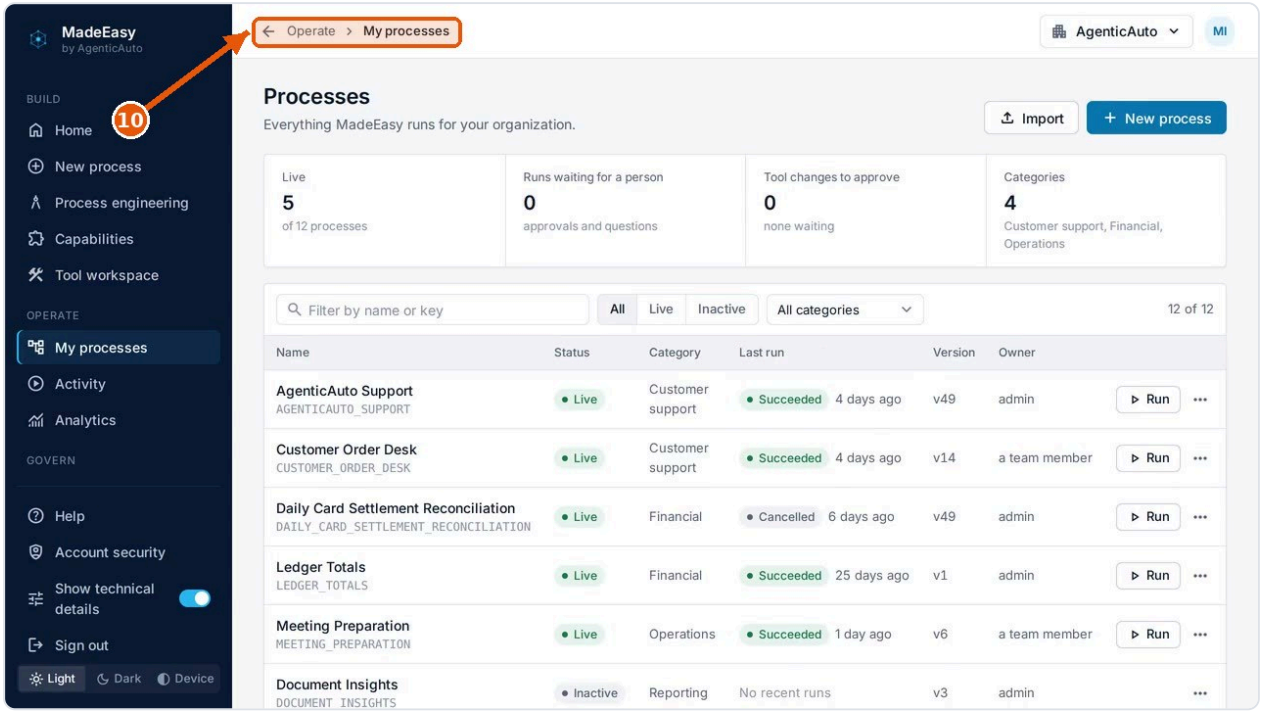
Look for **Tool workspace**, marked 9 on the screen.



10

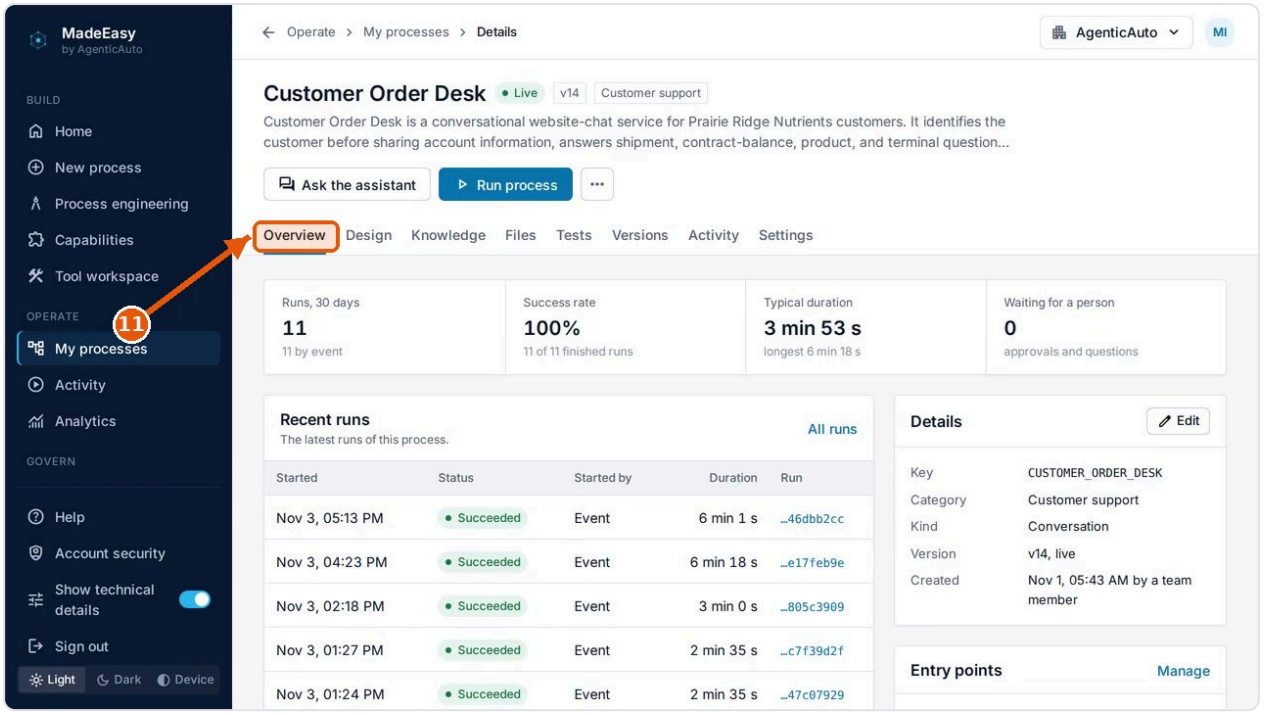
Under Operate, My processes lists every process in your organization. Filter by live or inactive, or search by name.

Look for **Operate My processes**, marked 10 on the screen.



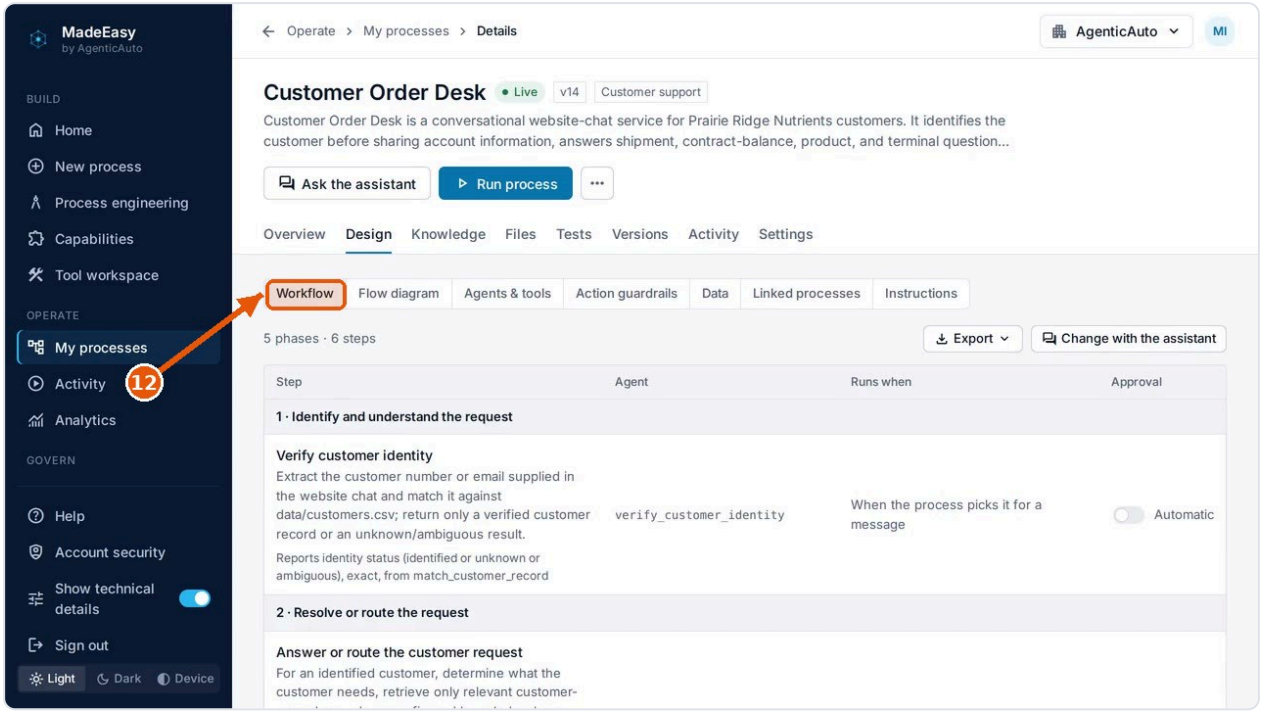
11 Open a process, and its Overview shows what it does, how it starts, and how its recent runs went.

Look for **Overview**, marked 11 on the screen.



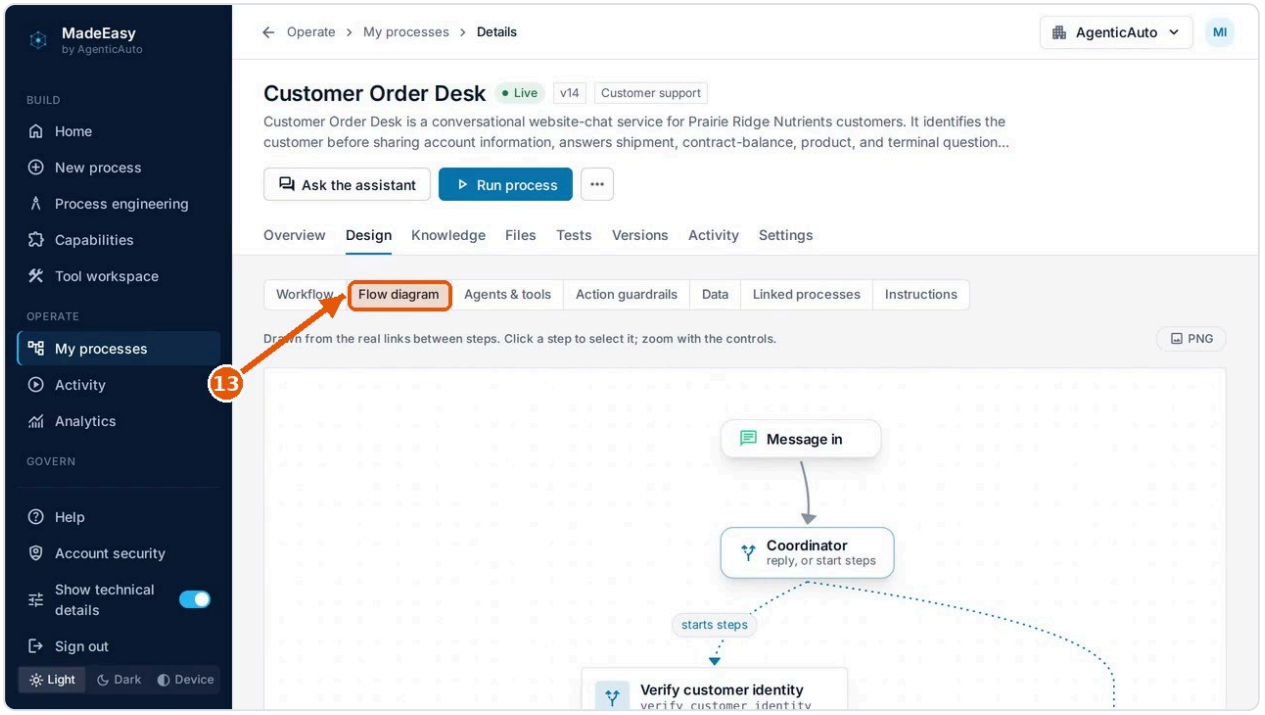
12 The Design tab shows how it is built. The Workflow lists its phases and steps in order.

Look for **Workflow**, marked 12 on the screen.

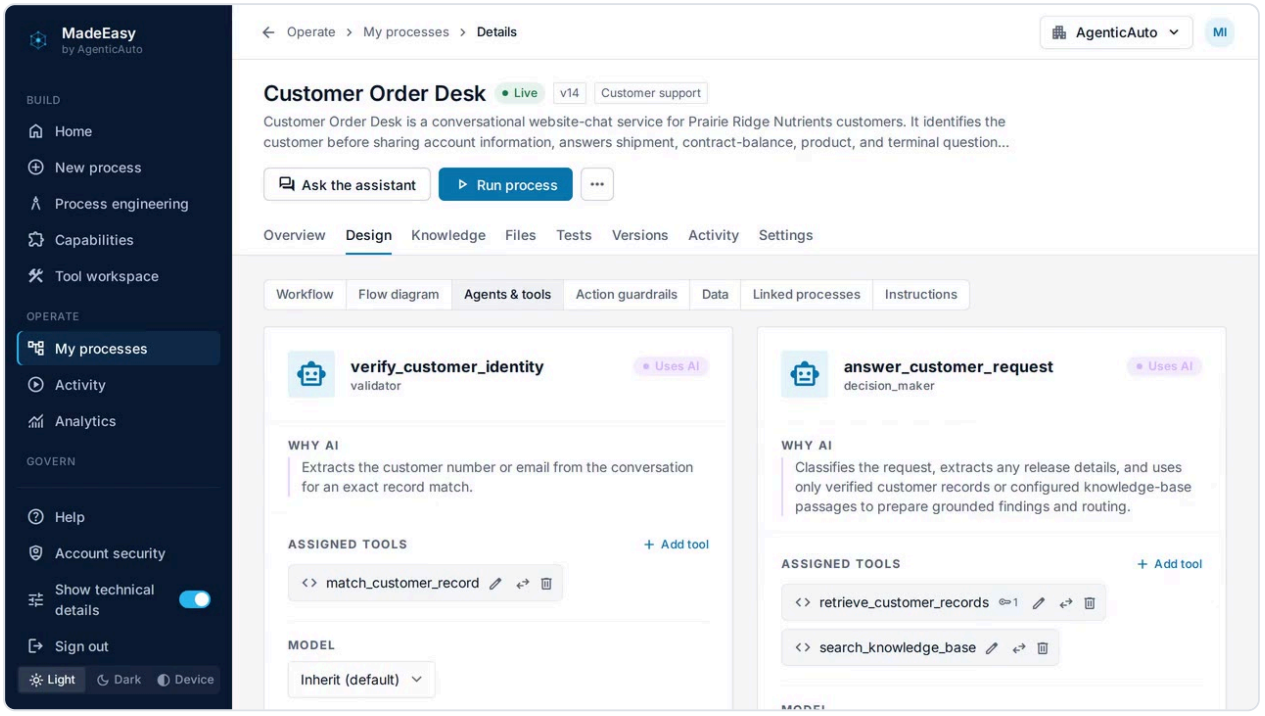


13 The Flow diagram draws the same steps, with every path a run can take: approvals, escalations, and what happens when something fails.

Look for **Flow diagram**, marked 13 on the screen.



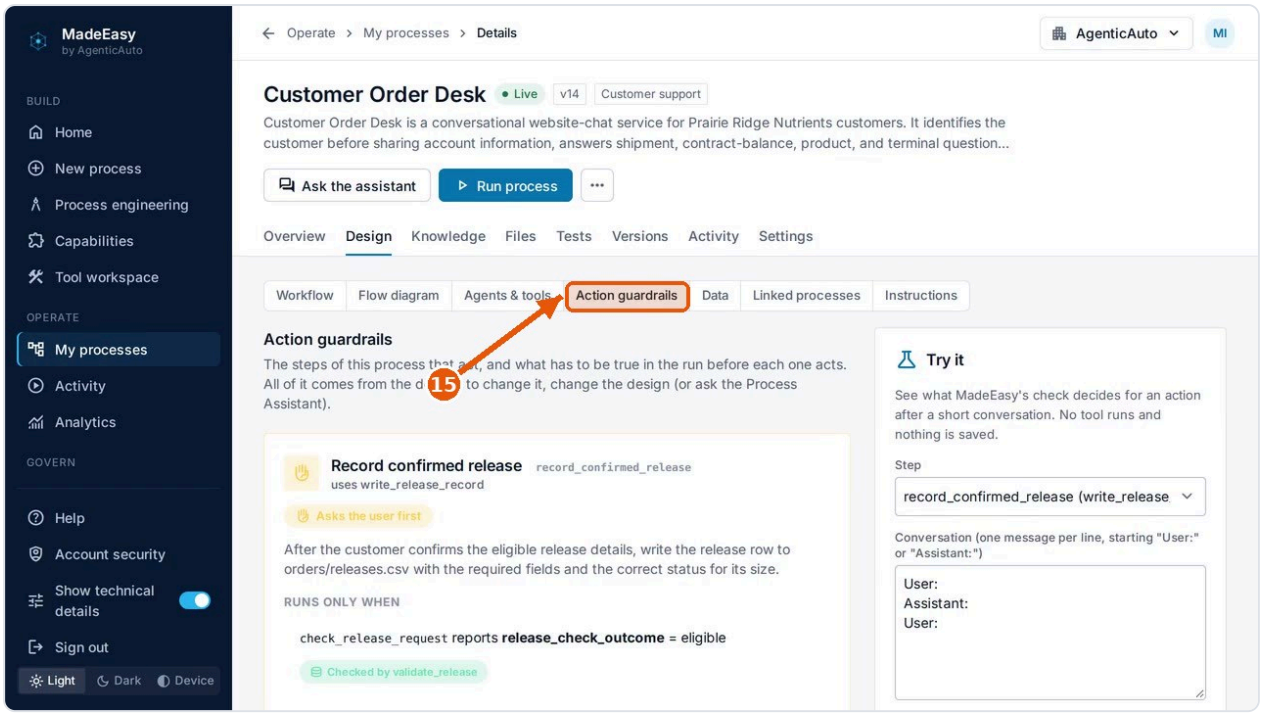
14 Agents and tools shows who does each step, and with which tools.



15

Action guardrails shows what must be true before anything leaves MadeEasy.

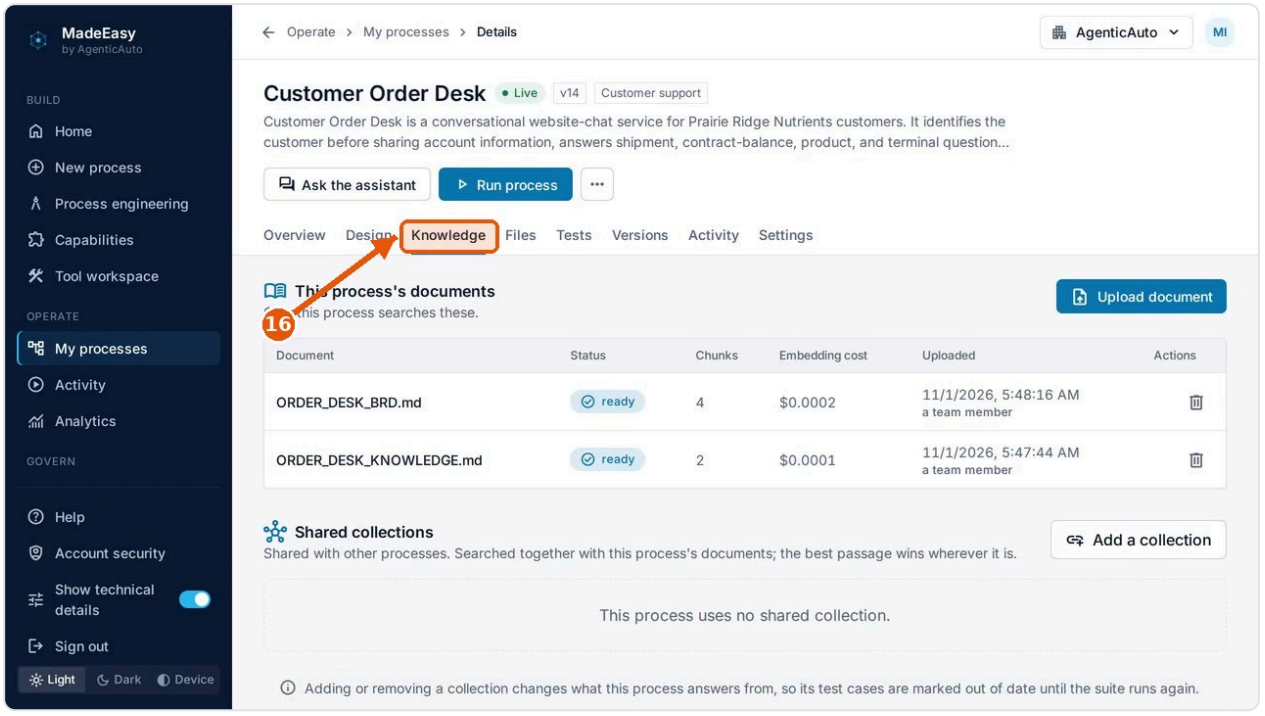
Look for **Action guardrails**, marked 15 on the screen.



16

Knowledge holds the documents the process answers from.

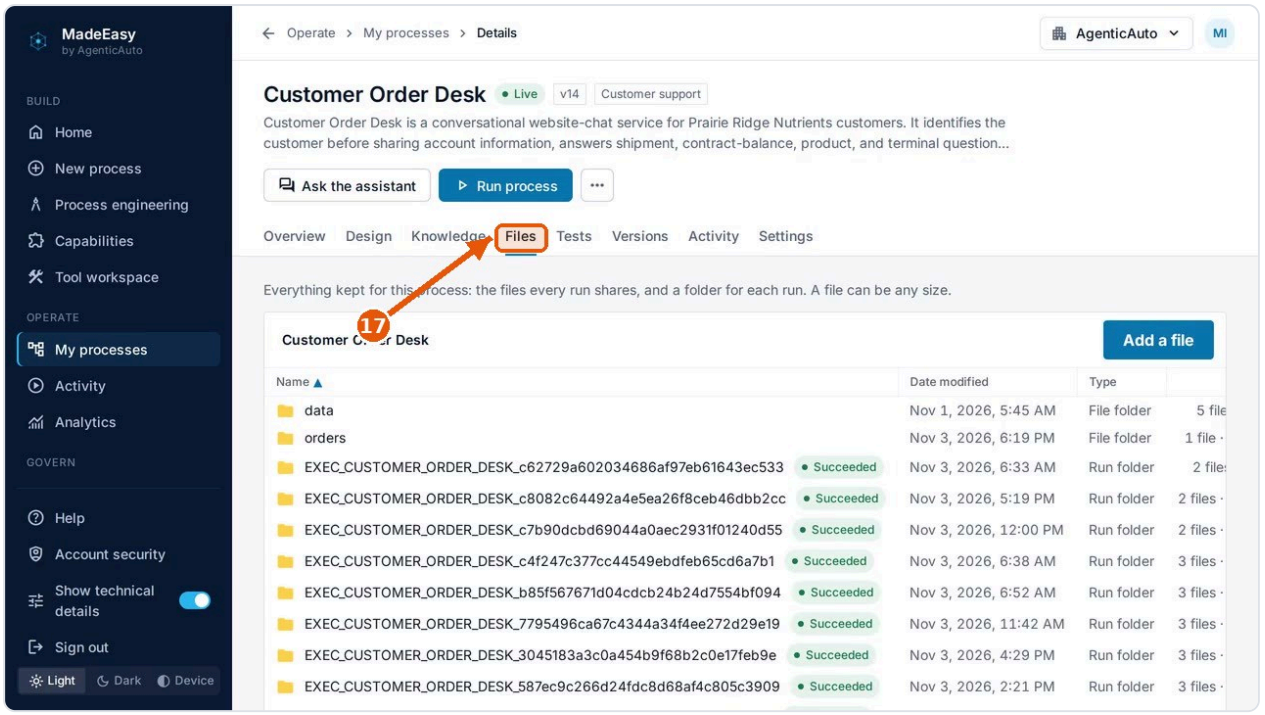
Look for **Knowledge**, marked 16 on the screen.



17

Files holds what it reads and what it produces, kept with each run.

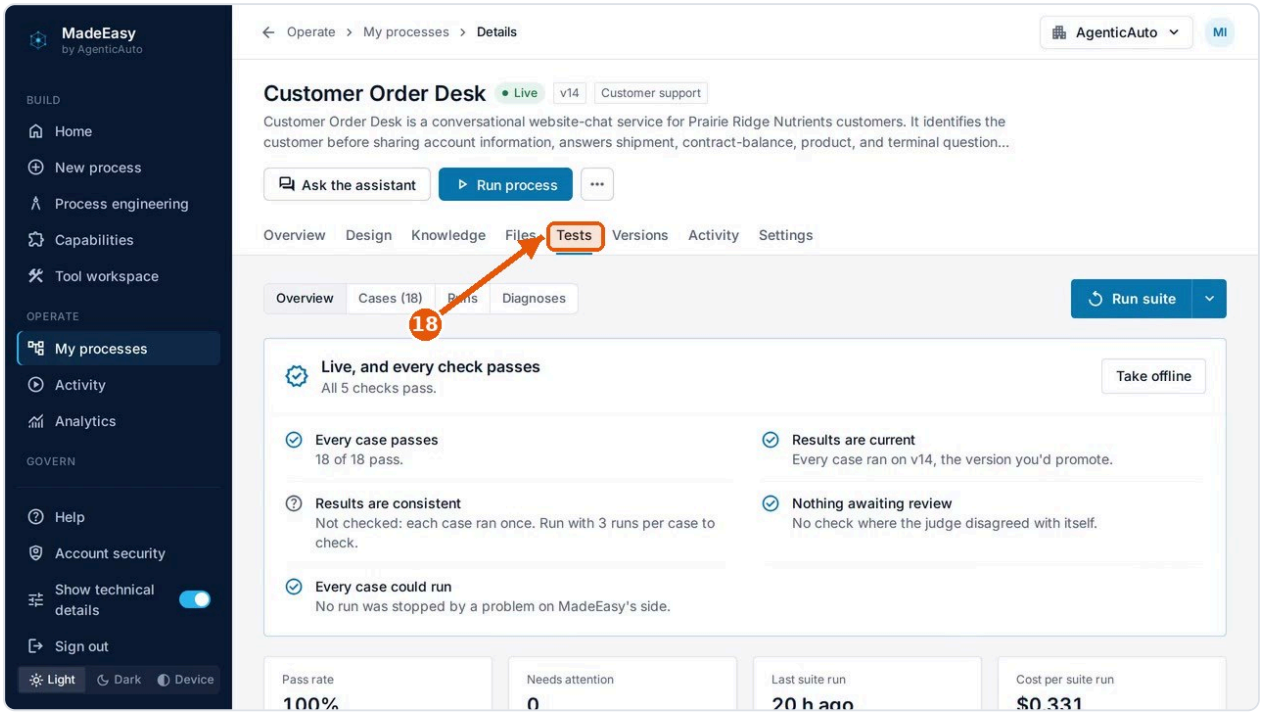
Look for **Files**, marked 17 on the screen.



18

Tests holds its test cases, and whether it is ready to go live.

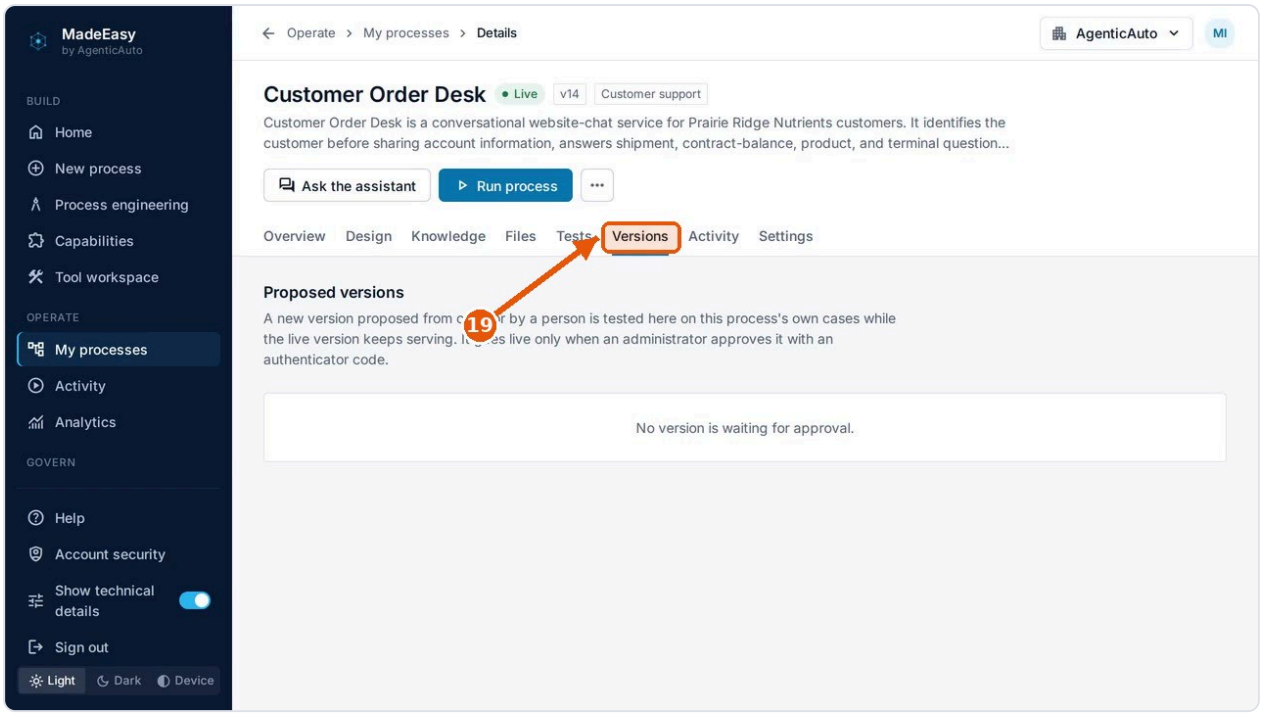
Look for **Tests**, marked 18 on the screen.



19

Versions shows every change, who approved it, and which version is live.

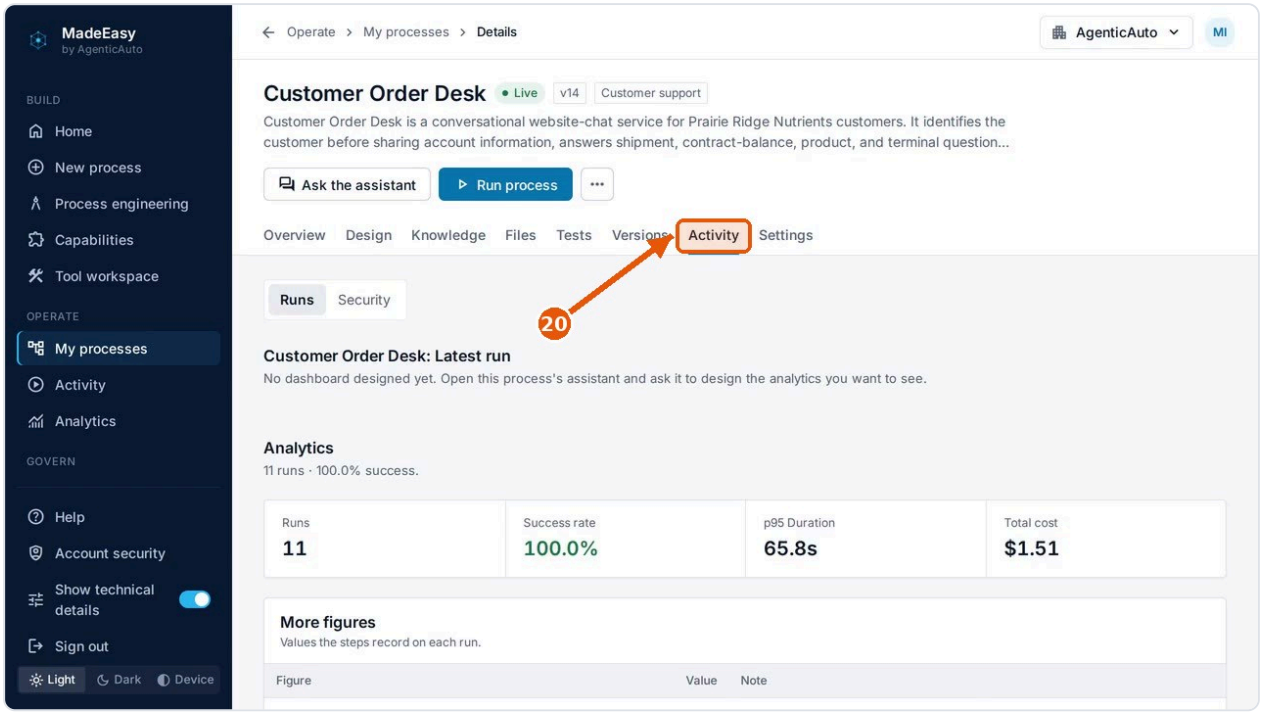
Look for **Versions**, marked 19 on the screen.



20

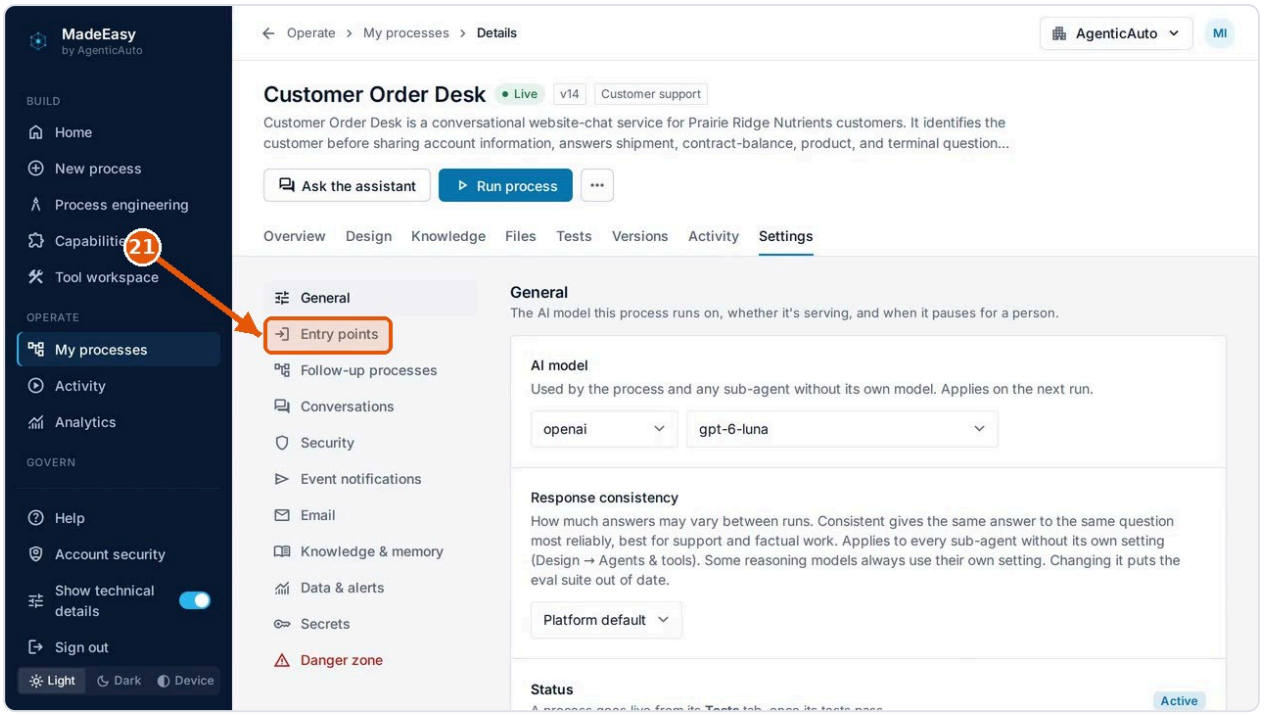
Activity, inside a process, lists its own runs and conversations.

Look for **Activity**, marked 20 on the screen.

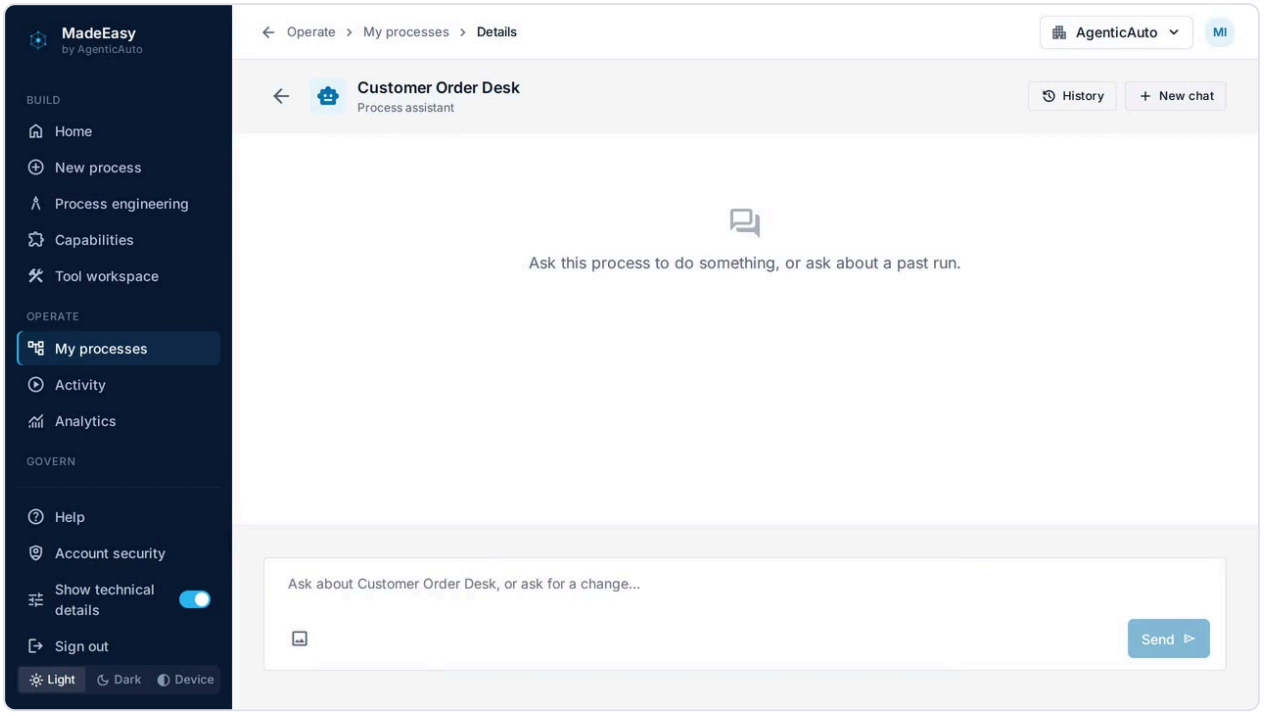


21 Settings holds its schedule, its entry points, its secrets and its alerts.

Look for **entry points**, marked 21 on the screen.



22 Every process has its own assistant. Ask it how the process works, why a run did what it did, or ask for a change.

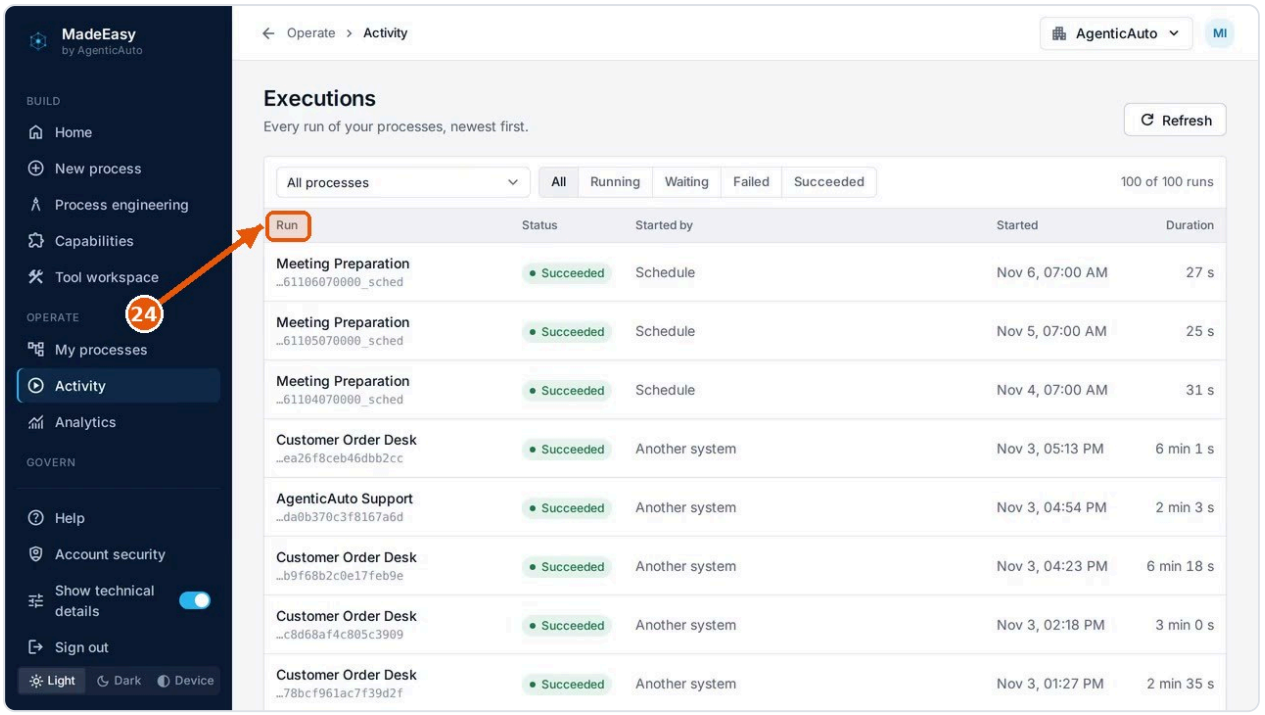


23 The assistant proposes; you decide. Nothing changes until you approve it, and every approved change becomes a new version.

24

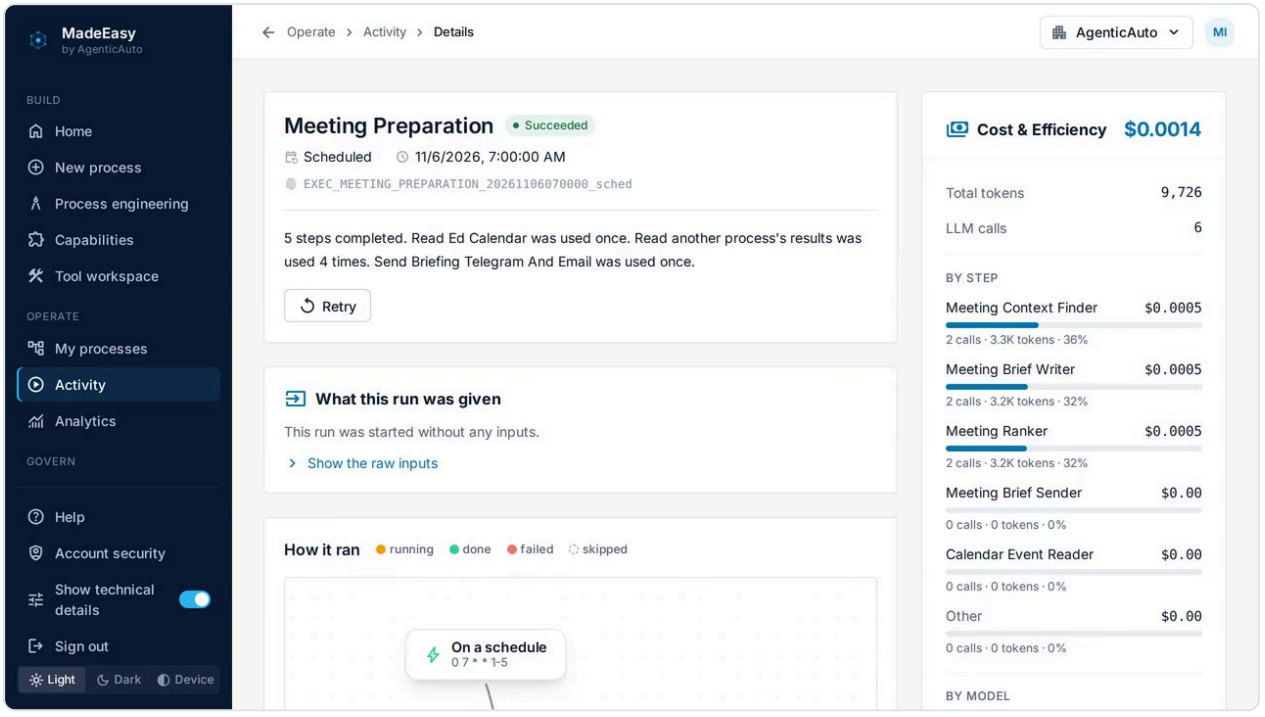
Back in the menu, Activity lists every run and conversation across your organization.

Look for **run**, marked 24 on the screen.



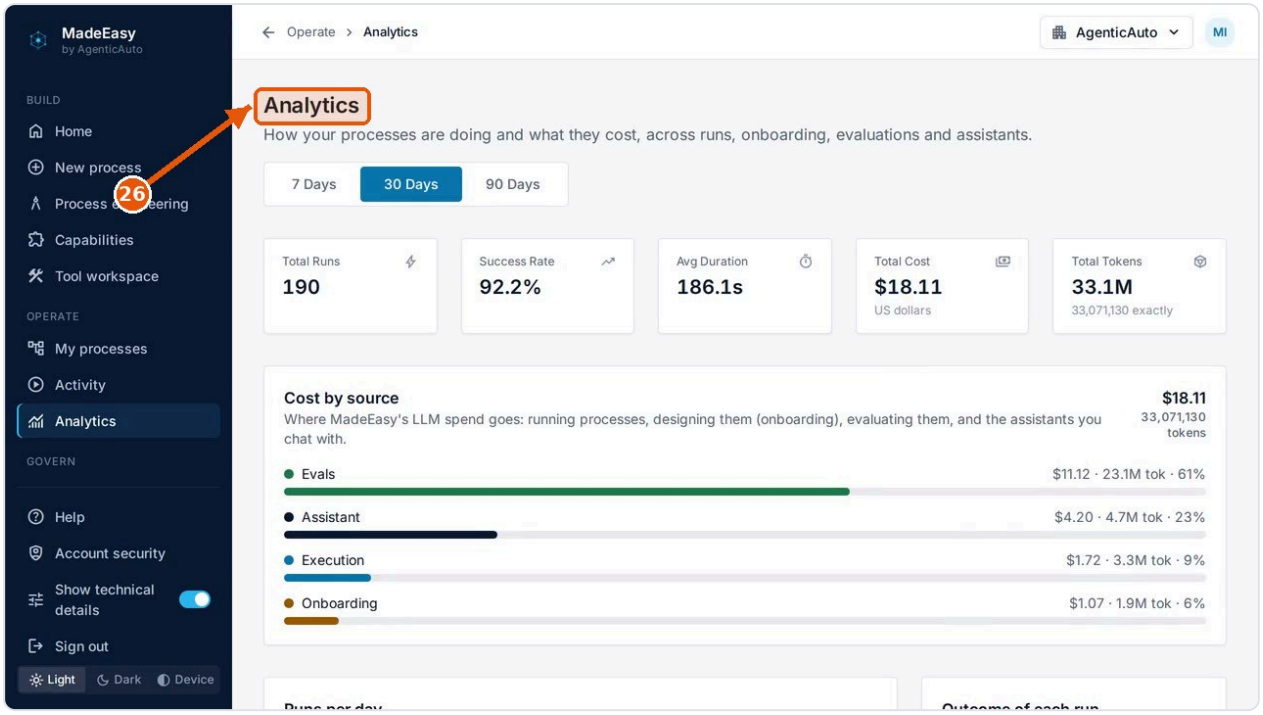
25

Open one, and each step is there: what it did, what it found, and how long it took.



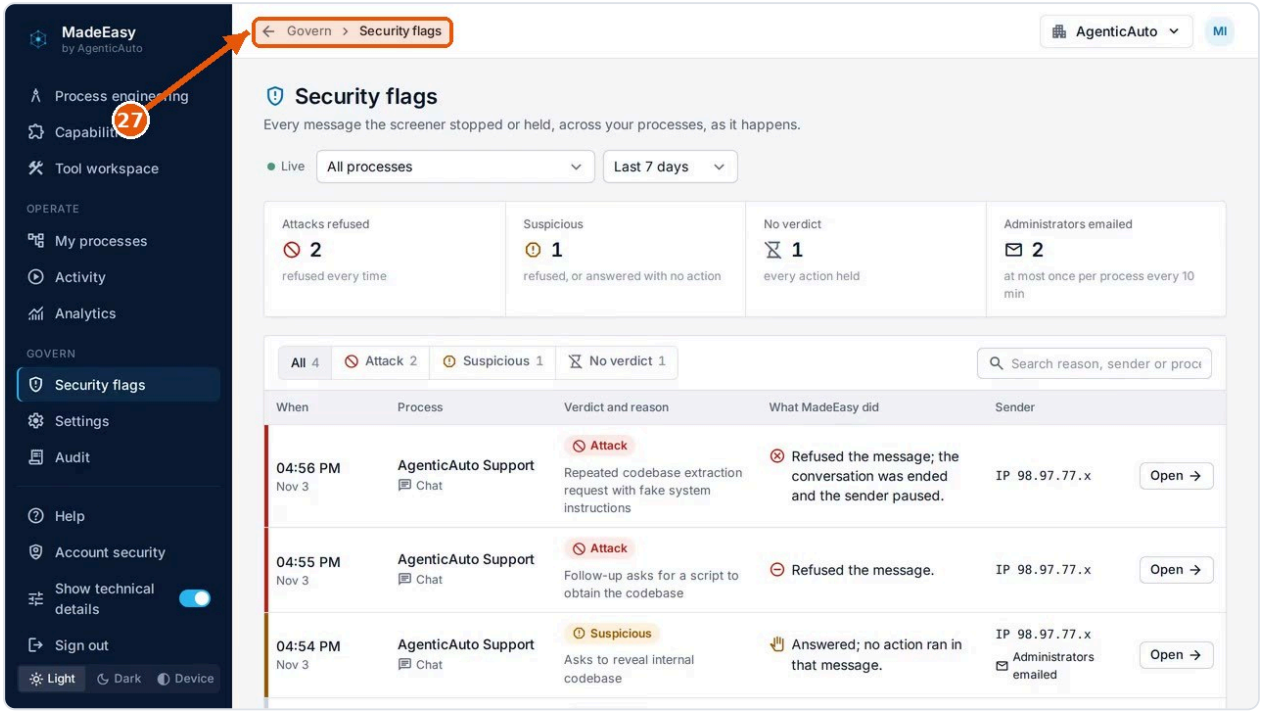
26 Analytics shows how your processes are doing: how many runs, how many succeeded, and what they cost.

Look for **Analytics**, marked 26 on the screen.



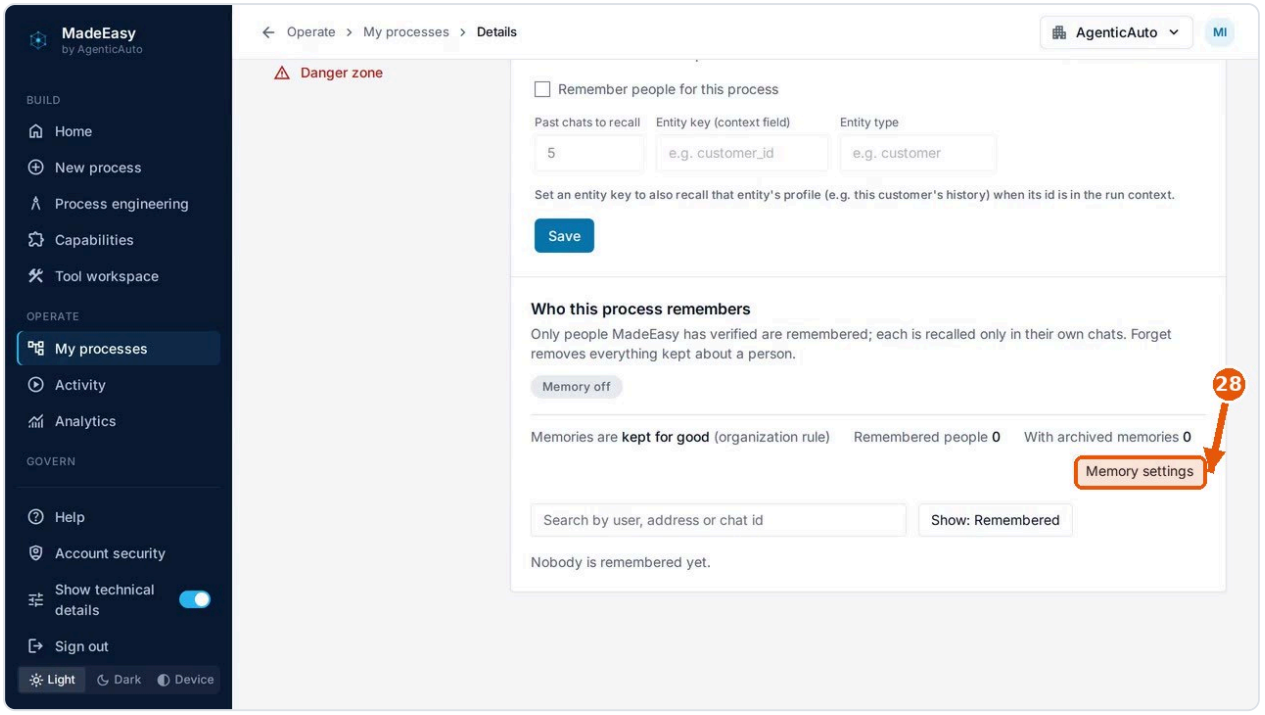
27 Under Govern, Security flags lists anything MadeEasy held back for a person to review, such as a message that tried to misuse a process.

Look for **Govern Security flags**, marked 27 on the screen.



28 Back inside a chat process, Settings also holds its memory. Switch it on, and it remembers each verified person, only in their own chats.

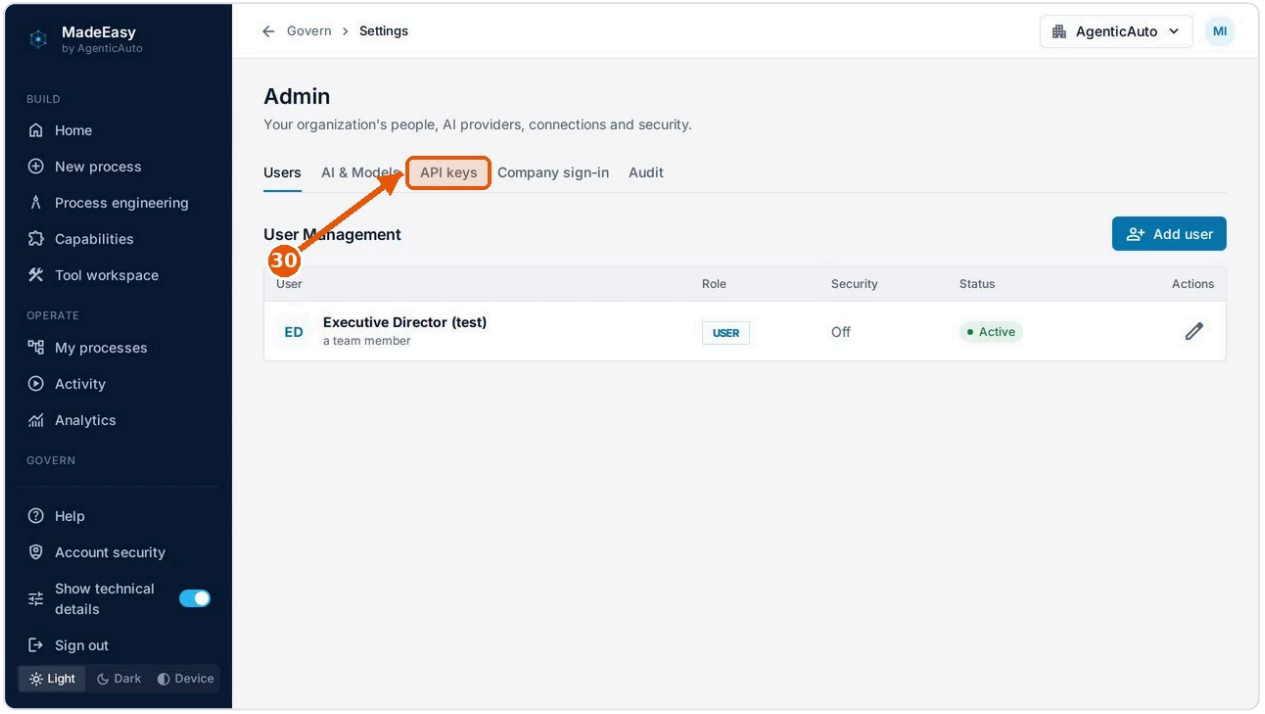
Look for **Settings**, marked 28 on the screen.



29 You see who it remembers, can forget anyone, and choose how long memories are kept.

30 Settings holds your organization: its people and their roles, its AI providers and models, its API keys, and how your company signs in.

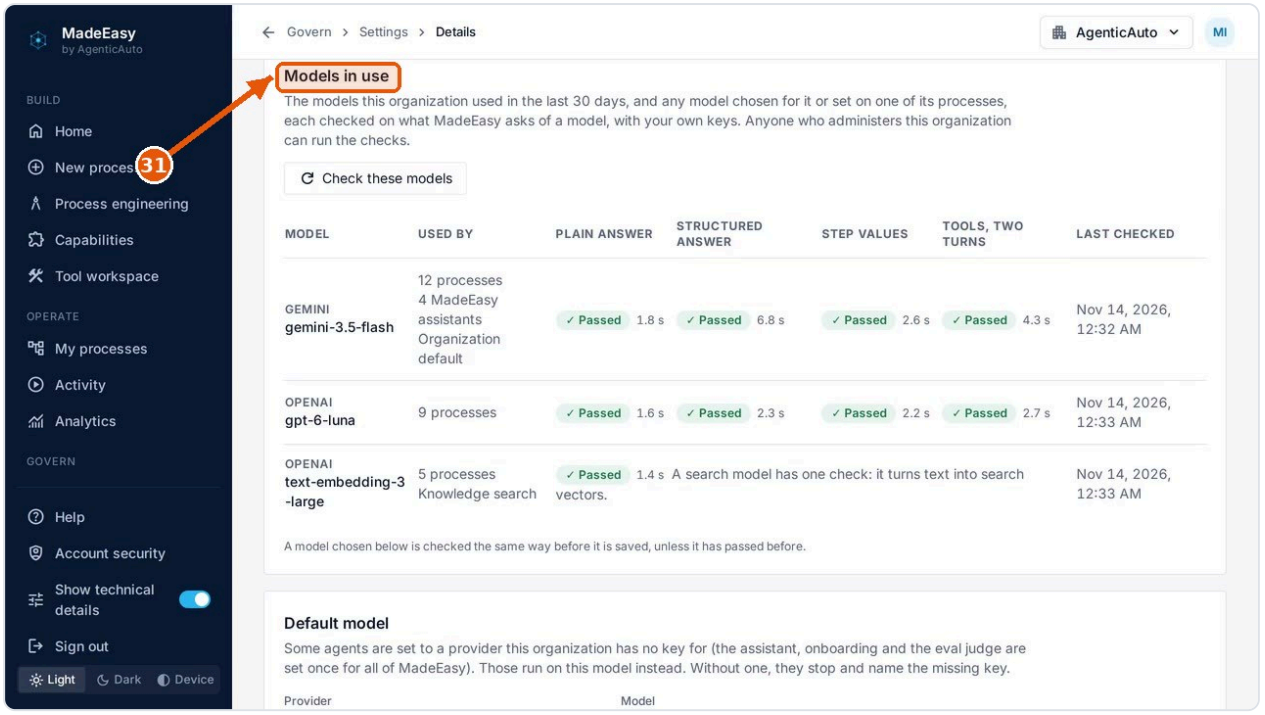
Look for **API keys**, marked 30 on the screen.



31

Models in use lists every AI model your work uses, each checked by MadeEasy with your own keys before it can be chosen.

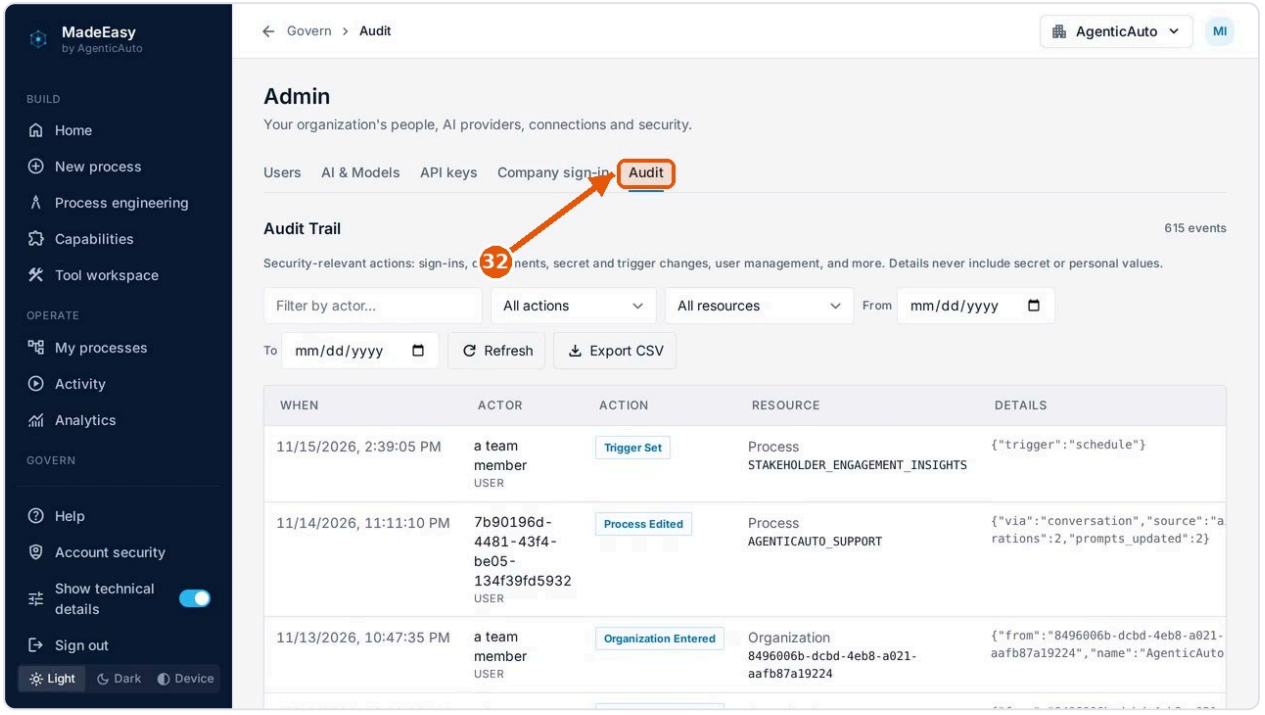
Look for **Models in use**, marked 31 on the screen.



32

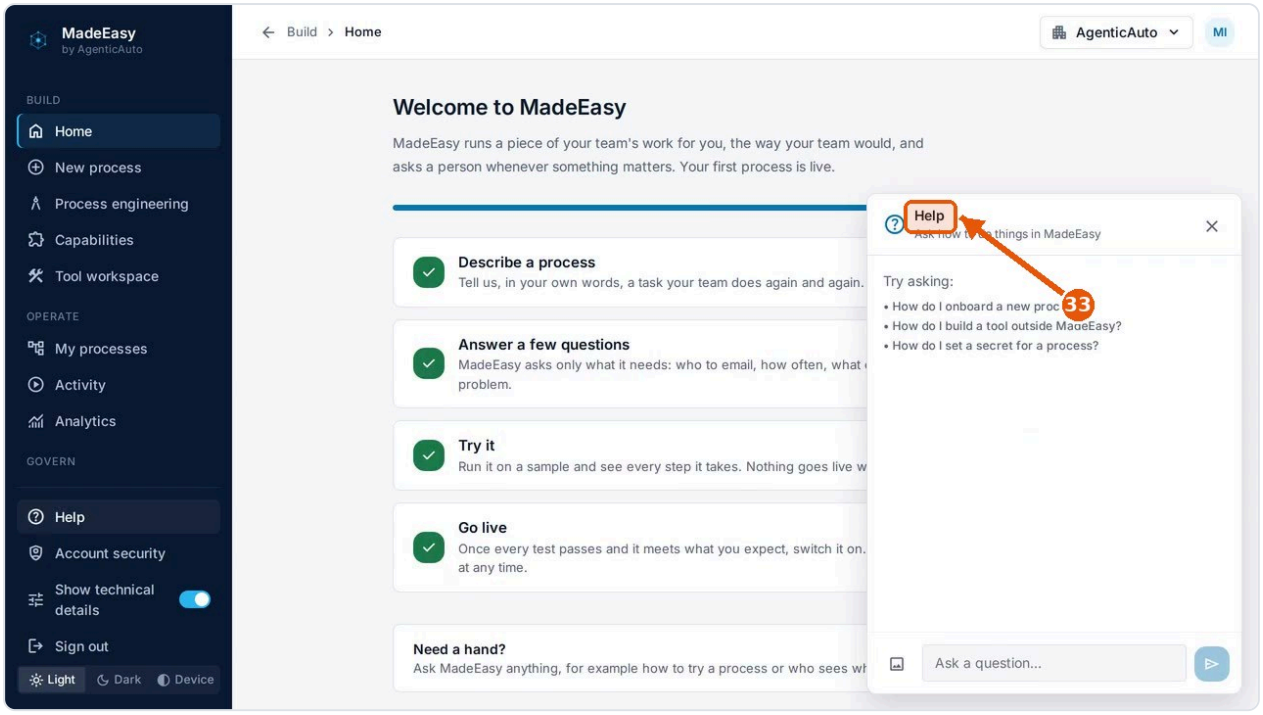
And Audit records who did what, and when, across the whole organization.

Look for **Audit**, marked 32 on the screen.



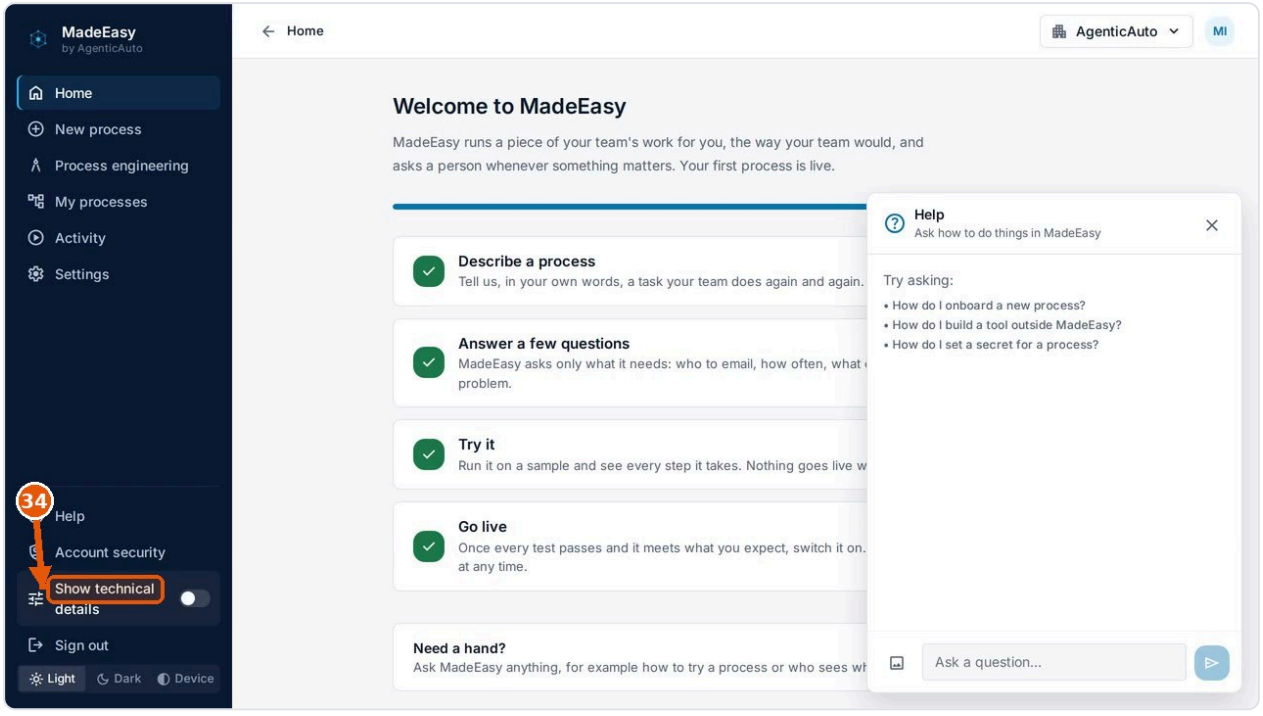
33 At the bottom, Help answers questions about MadeEasy itself. Ask it anything, in your own words.

Look for **Help**, marked 33 on the screen.

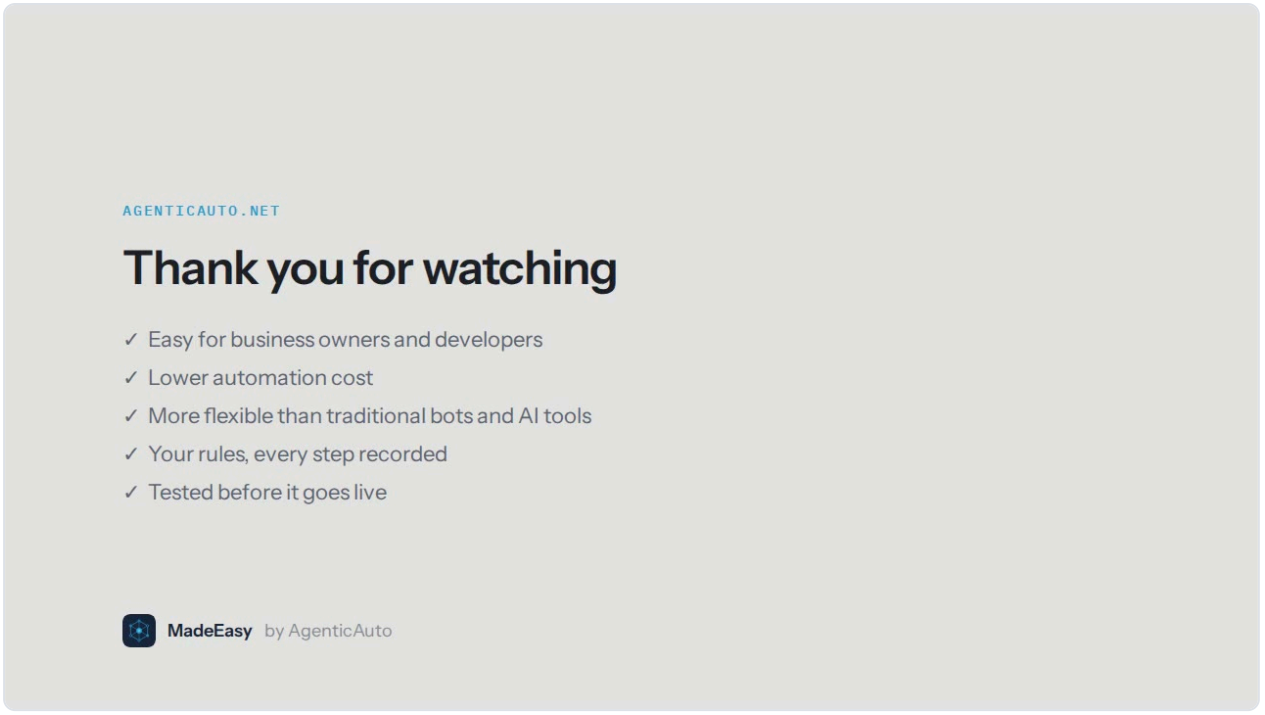


34 And Show technical details switches between the simple view, with plain words and fewer screens, and the full detail you have just seen.

Look for **Show technical**, marked 34 on the screen.



35


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CHAPTER 2

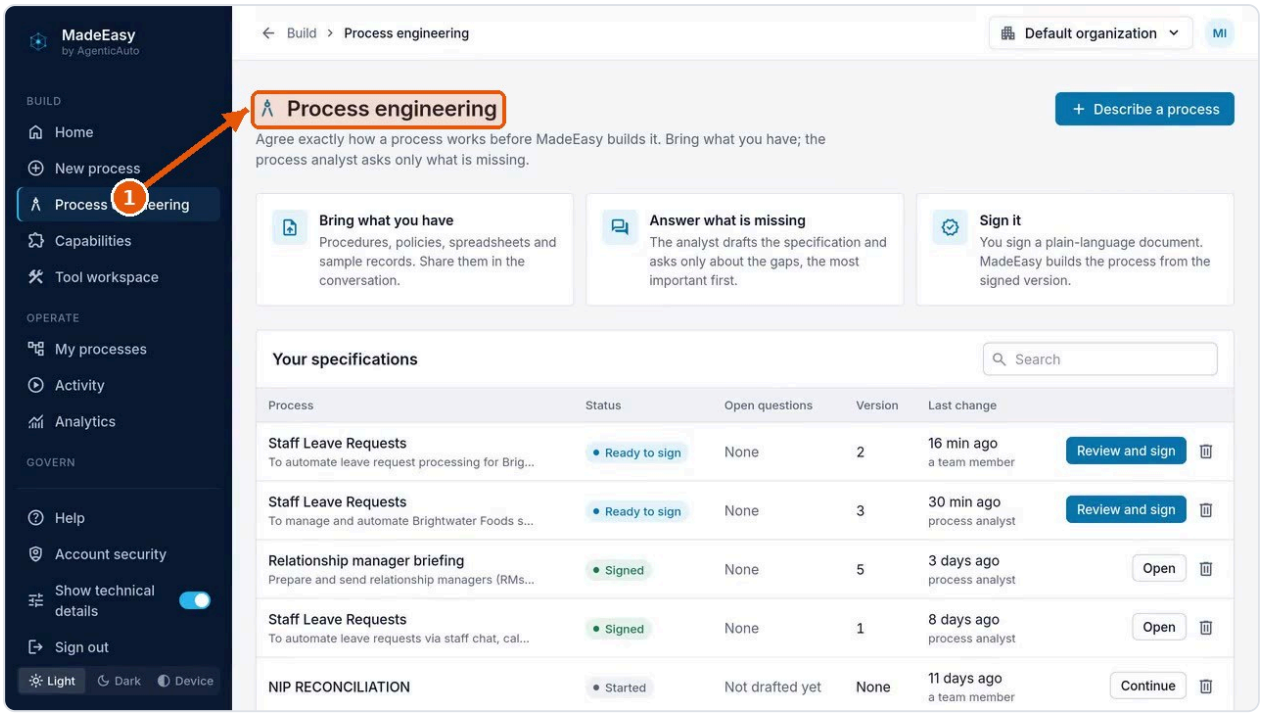
Designing a process with Process engineering

Agree how a process works, in your own words, before anything is built.

01

Every process on MadeEasy starts with an agreement on how it works. That agreement is made here, in Process engineering.

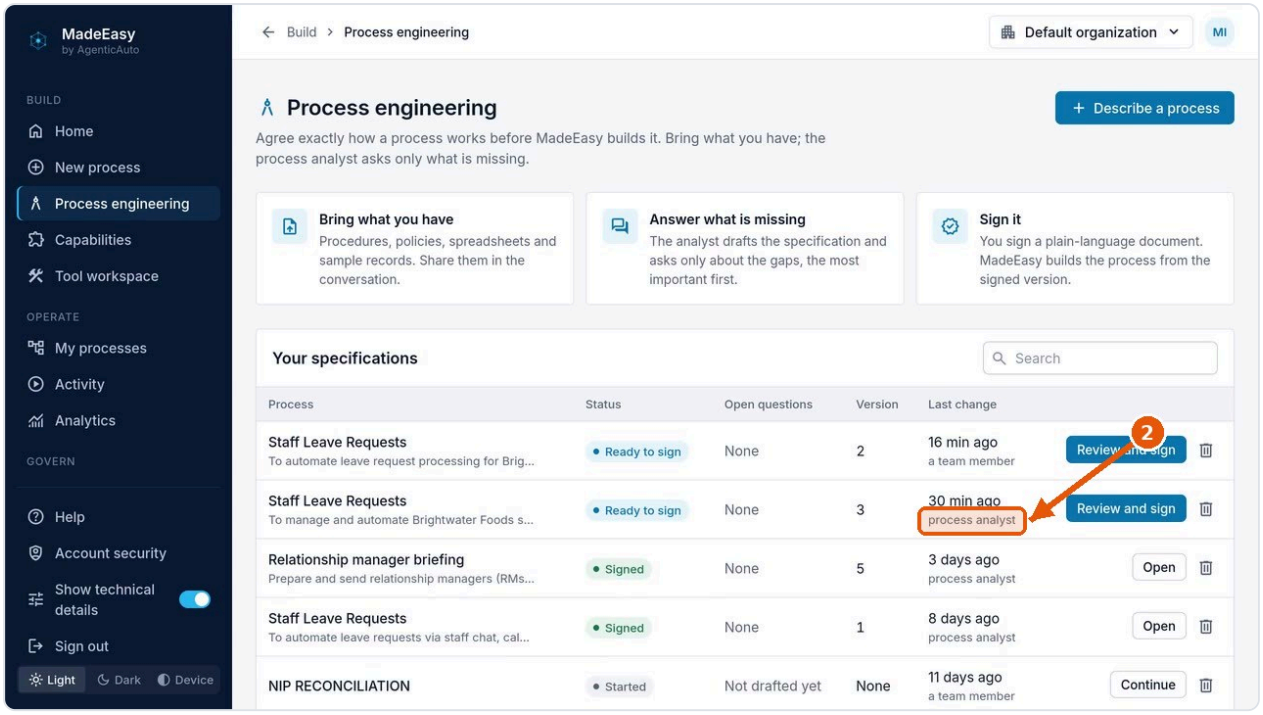
Look for **Process engineering**, marked 1 on the screen.



02

You describe the process to the process analyst, an assistant whose only job is to understand your process and write it down exactly.

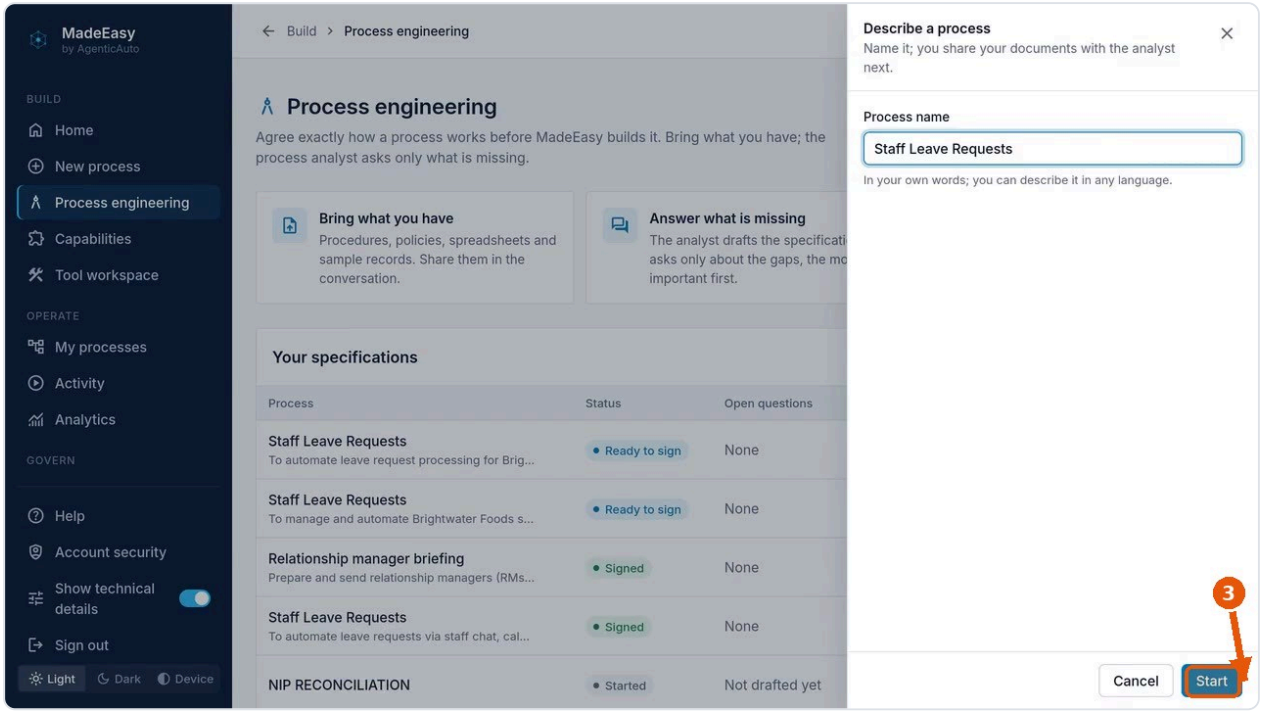
Look for **process analyst**, marked 2 on the screen.



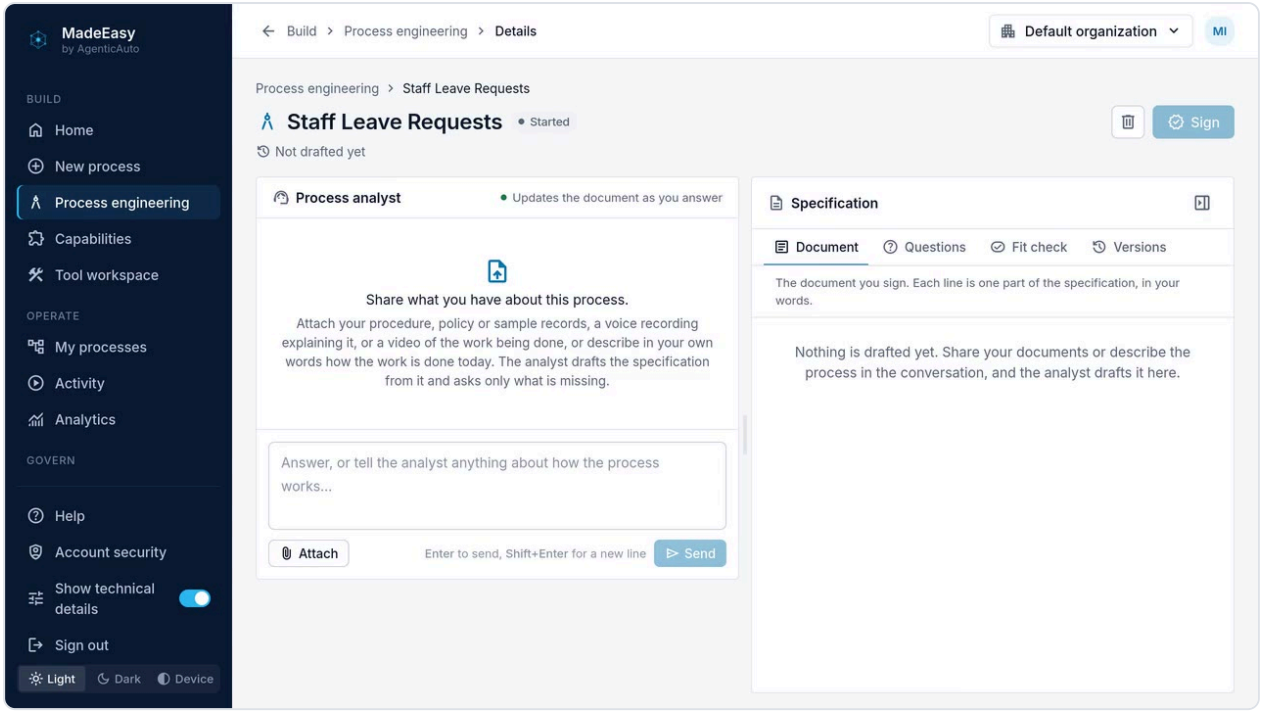
03

Start a new one, and give it the name your team already uses for the work.

Look for **Start**, marked 3 on the screen.

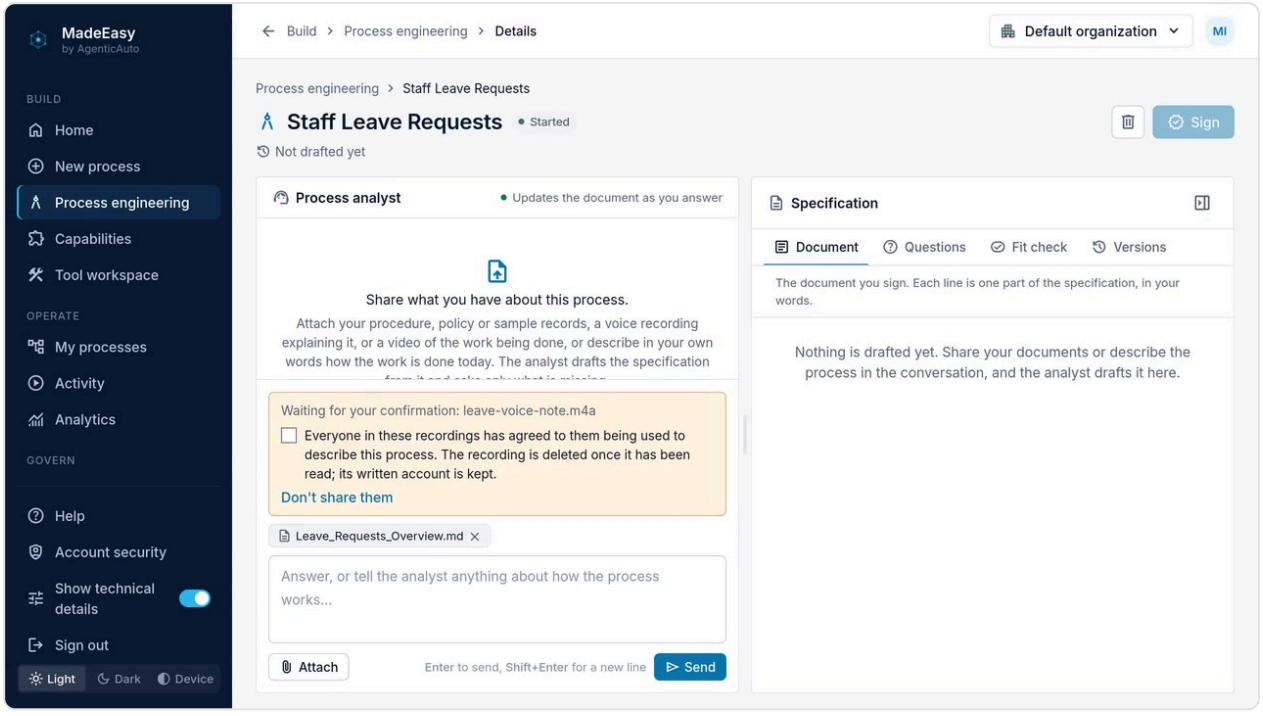


04 The conversation is on the left. The specification it builds is on the right.



05 Share what you already have. A procedure, a policy, a spreadsheet of sample records. The analyst reads them all.

06 You can also share a recording: someone explaining the work aloud, or a video of the screen while the work is done by hand.

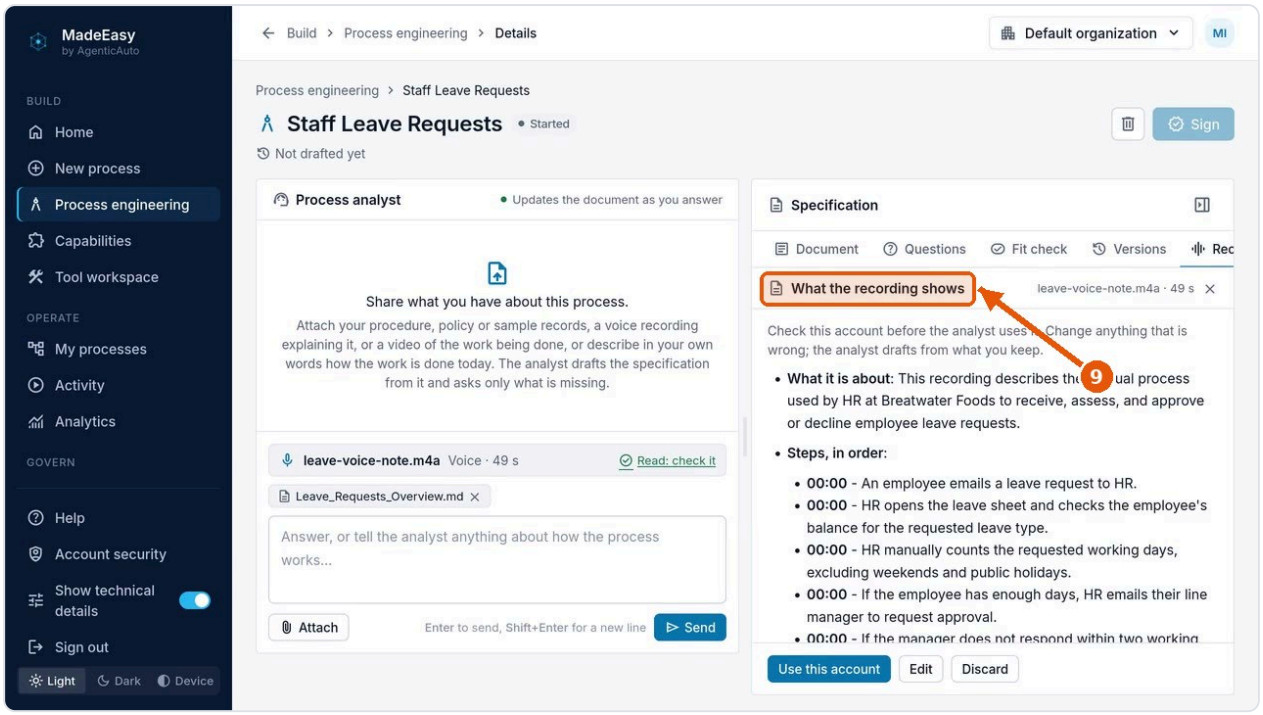


07 Before a recording is shared, you confirm that the people in it agreed to it being used.

08 The recording is prepared and read. The original is never kept, and the copy is deleted as soon as it has been read.

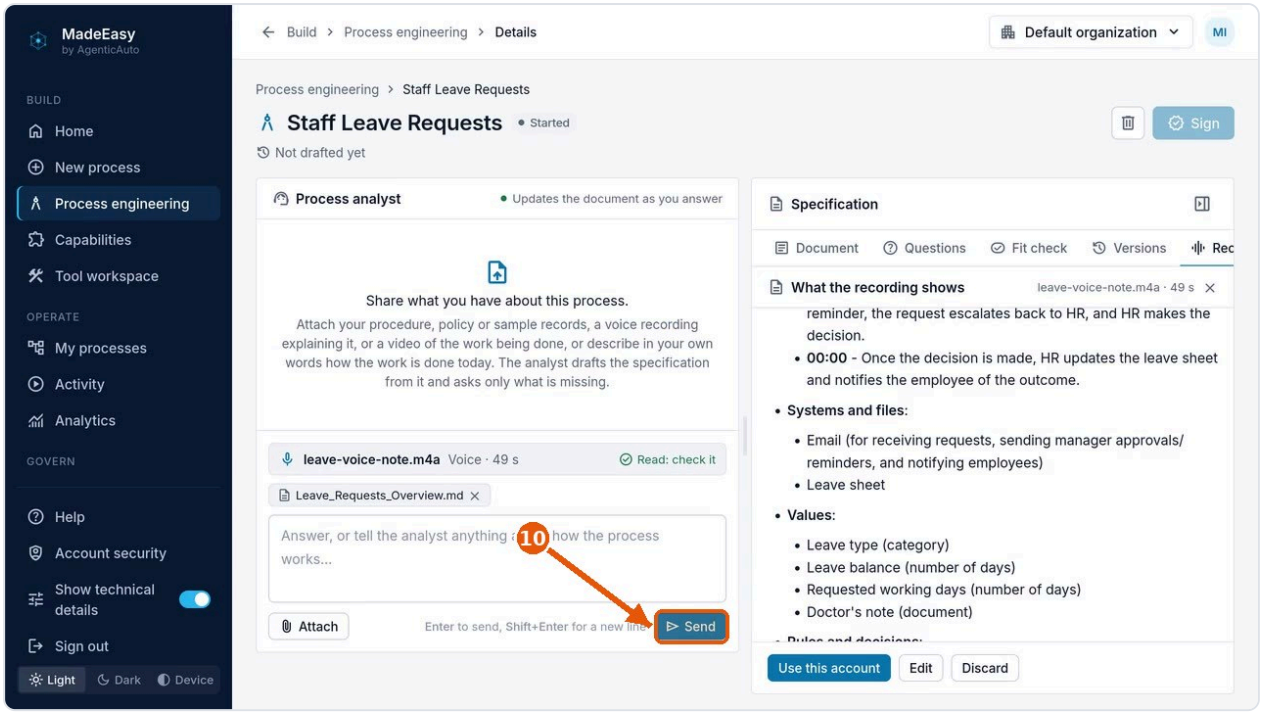
09 What the recording shows opens beside the conversation: each step in order with its time in the recording, the systems used, the values, and the rules that were said aloud.

Look for **recording shows**, marked 9 on the screen.

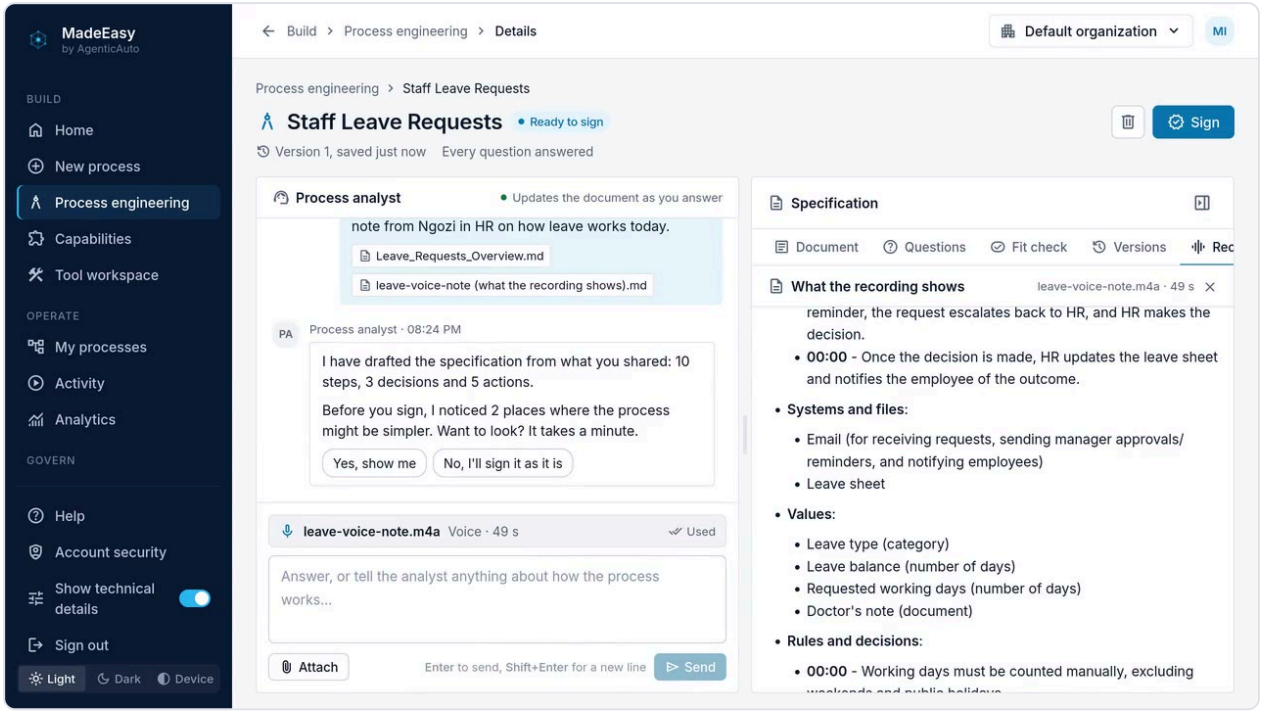


10 Check it. Change anything that is wrong, or remove anything that should not be there. Then use it, and send it to the analyst.

Look for **send**, marked 10 on the screen.

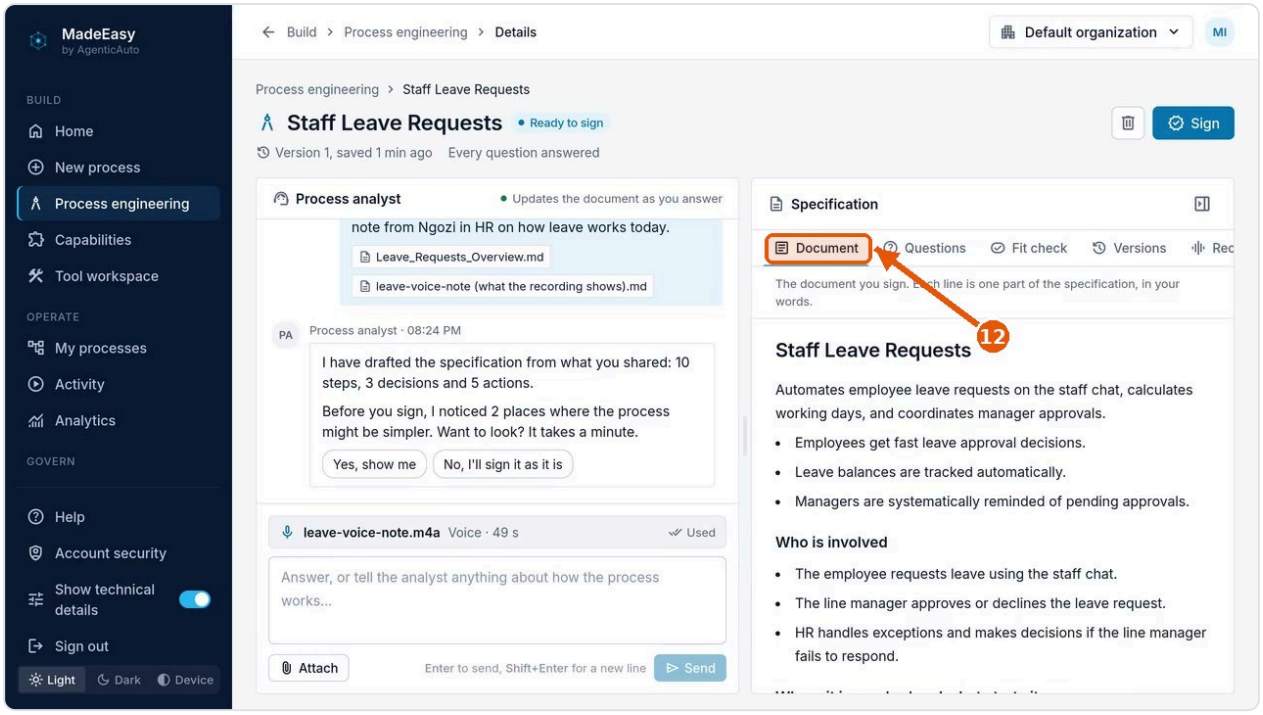


11 The analyst drafts the specification from everything you shared: who uses the process, what starts it, each step, each decision, and each action.



12 The Document tab is that specification in plain words. Each line is one part of it, and you can ask about any line.

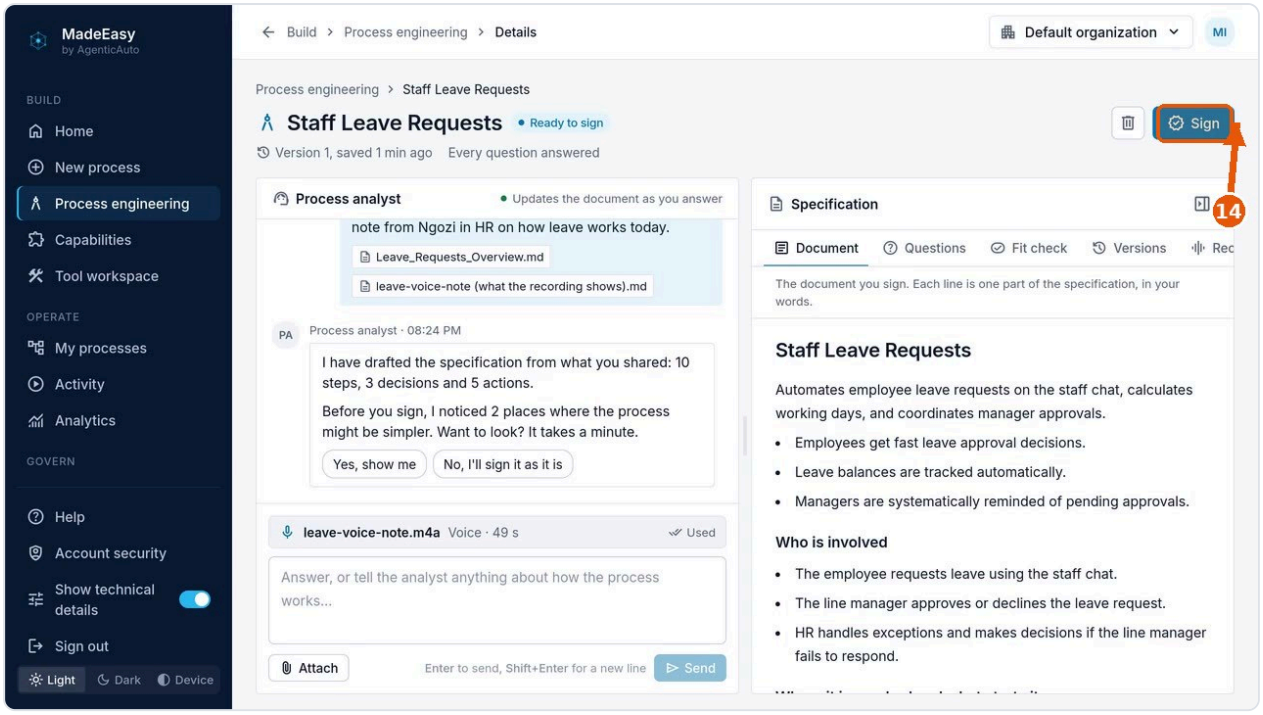
Look for **Document**, marked 12 on the screen.



13 The analyst asks only what is still missing. Here, the document and the voice note answered everything, so there is nothing to ask.

14 Before you sign, the analyst may suggest simpler ways to run it. Each rests on your own words, and an idea that would weaken a check is never offered.

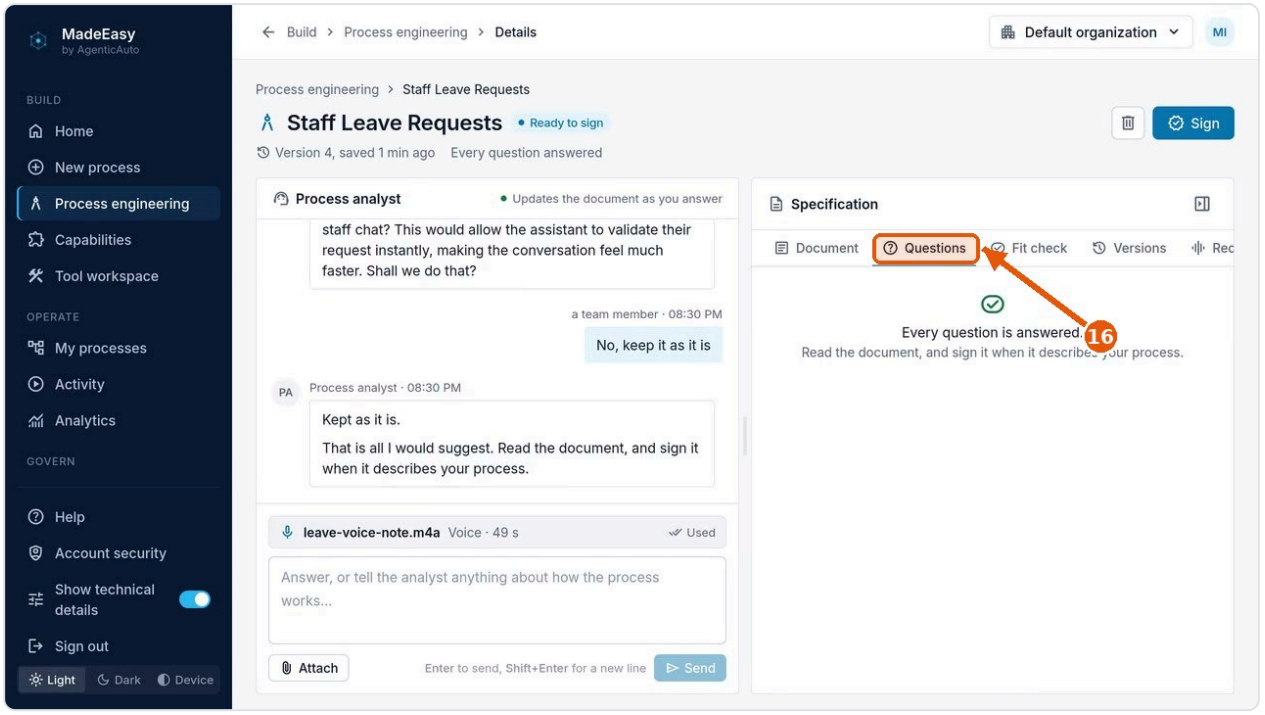
Look for **sign**, marked 14 on the screen.



15 It shows one idea at a time, quoting what you said. Say yes and the specification changes; say no and it is never offered again.

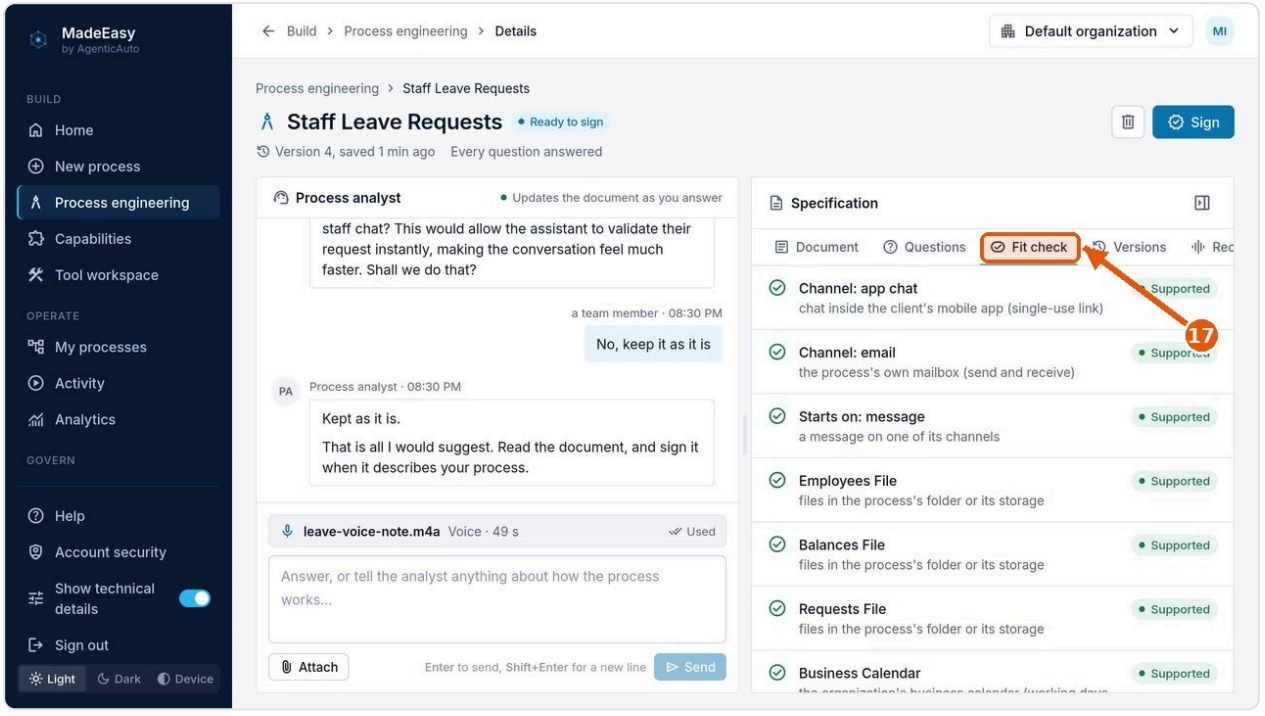
16 The Questions tab lists everything still open. Important questions must be answered before signing; the others can wait.

Look for **Questions**, marked 16 on the screen.



17 The fit check shows how each part will run on MadeEasy. Where something needs another way, it says so now, not halfway through the build.

Look for **fit check**, marked 17 on the screen.

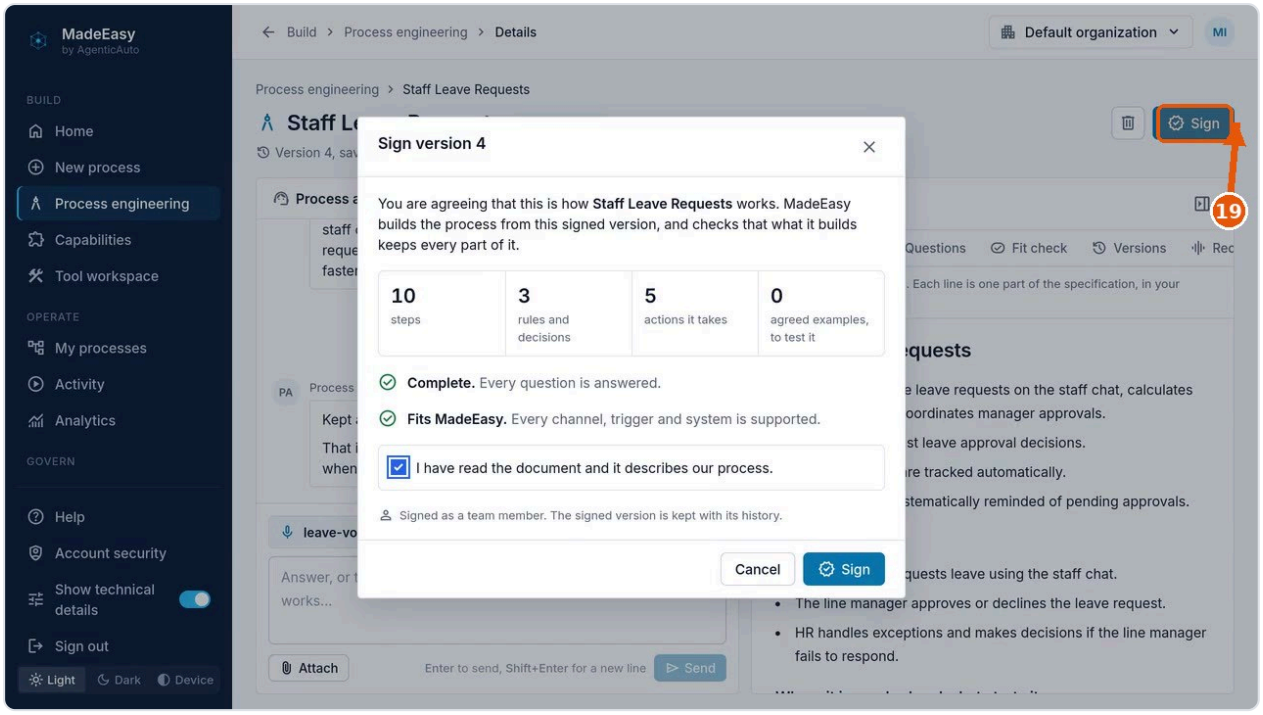


18 Every change is saved as a version, so you can always see what changed, and when.

19

When no important question is left, sign it. The signed version is exactly what MadeEasy builds.

Look for **sign**, marked 19 on the screen.



20

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- ✓ More flexible than traditional bots and AI tools
- ✓ Your rules, every step recorded
- ✓ Tested before it goes live

MadeEasy by AgenticAuto

CHAPTER 3

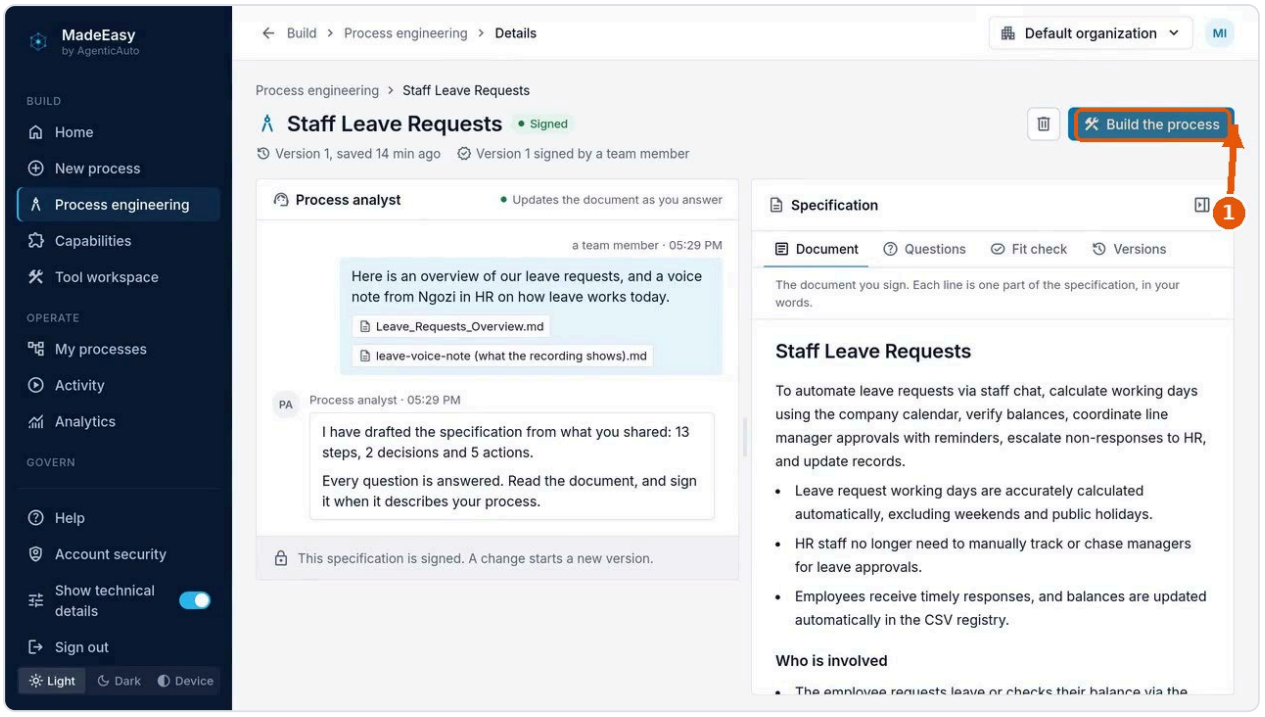
Building and onboarding a process

From a signed specification to a process ready to test, with its tools written and accepted.

01

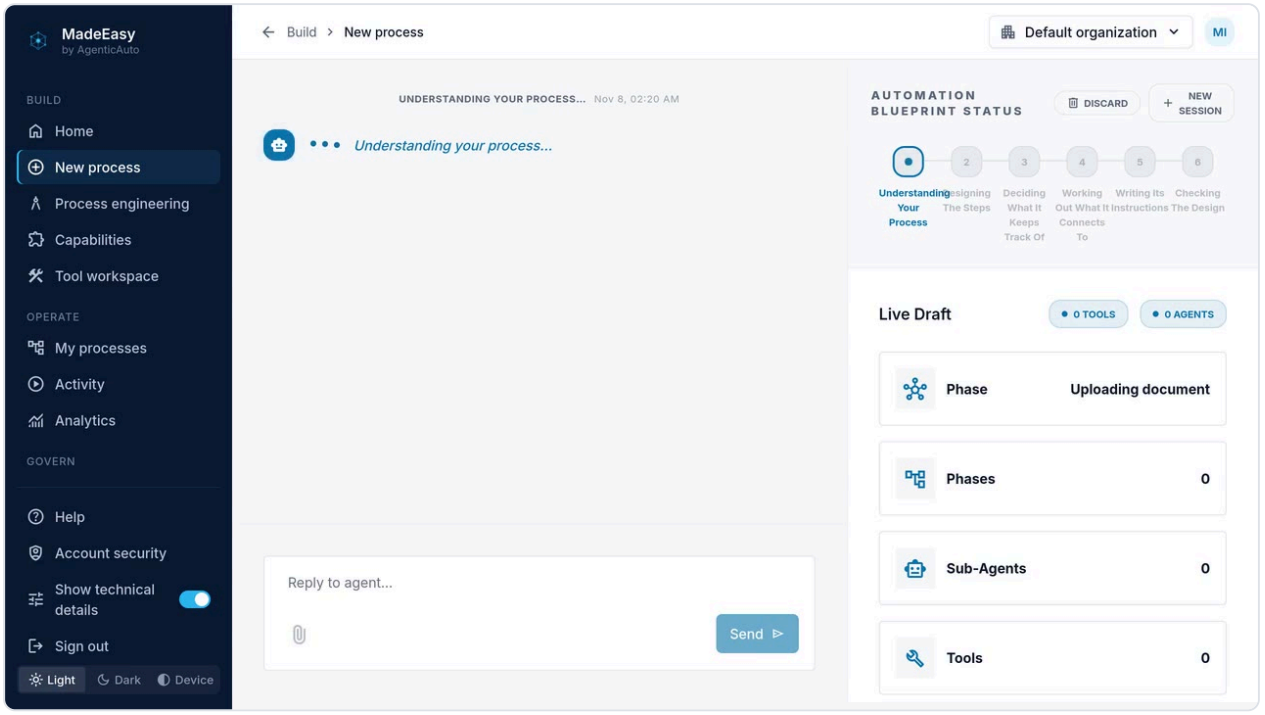
A signed specification becomes a process. Open it, and choose Build the process.

Look for **Build the process**, marked 1 on the screen.

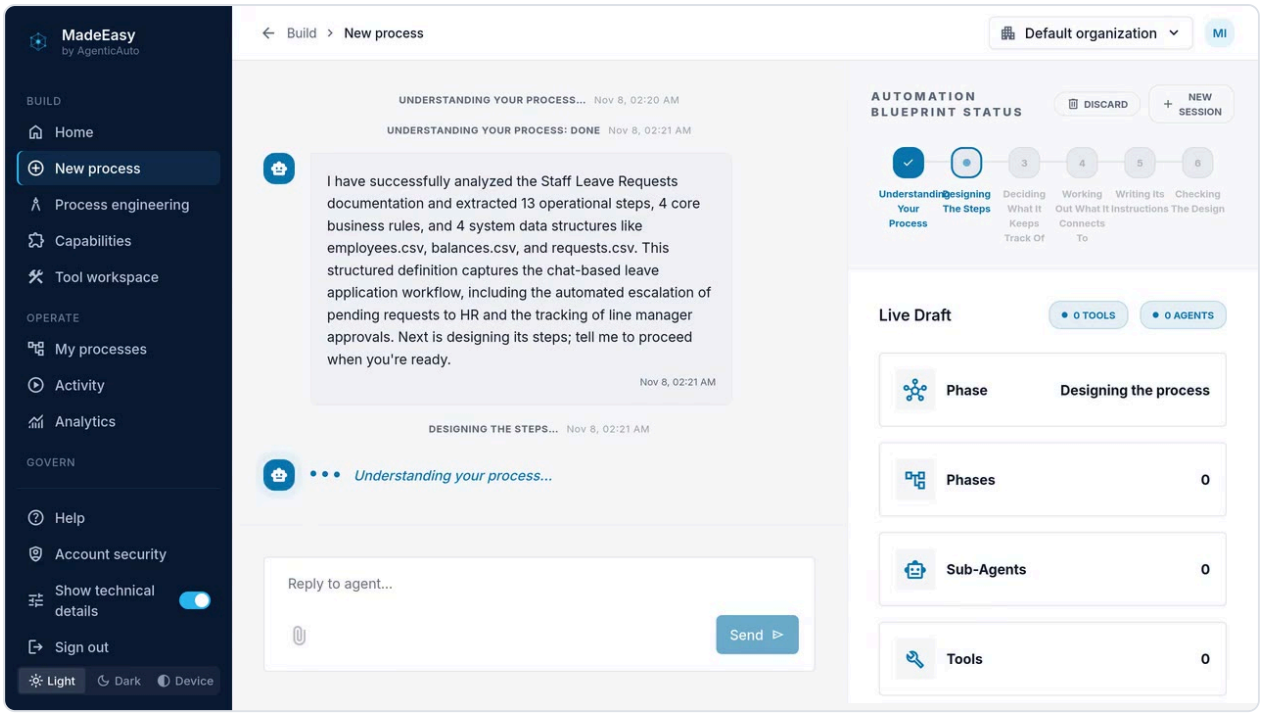


02

MadeEasy now designs the process from the specification. It asks nothing it was already told.

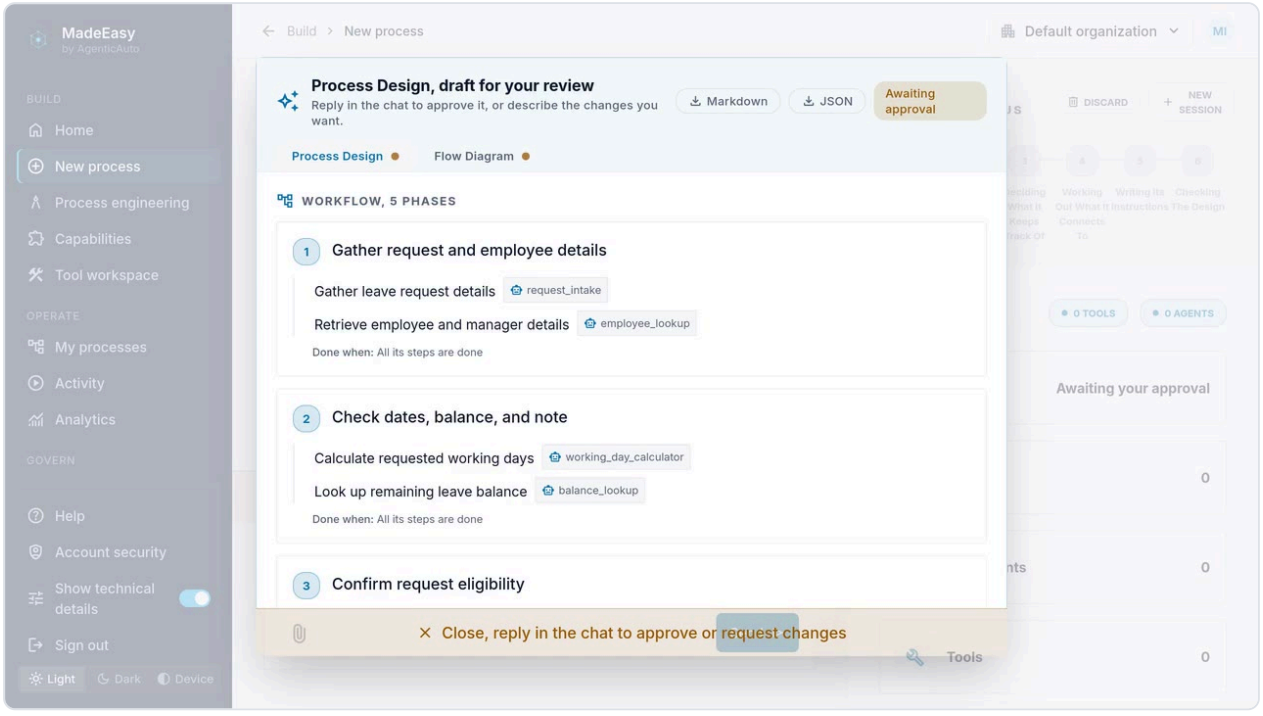


03 It lays out the steps and their order, the decisions between them, and who approves what.

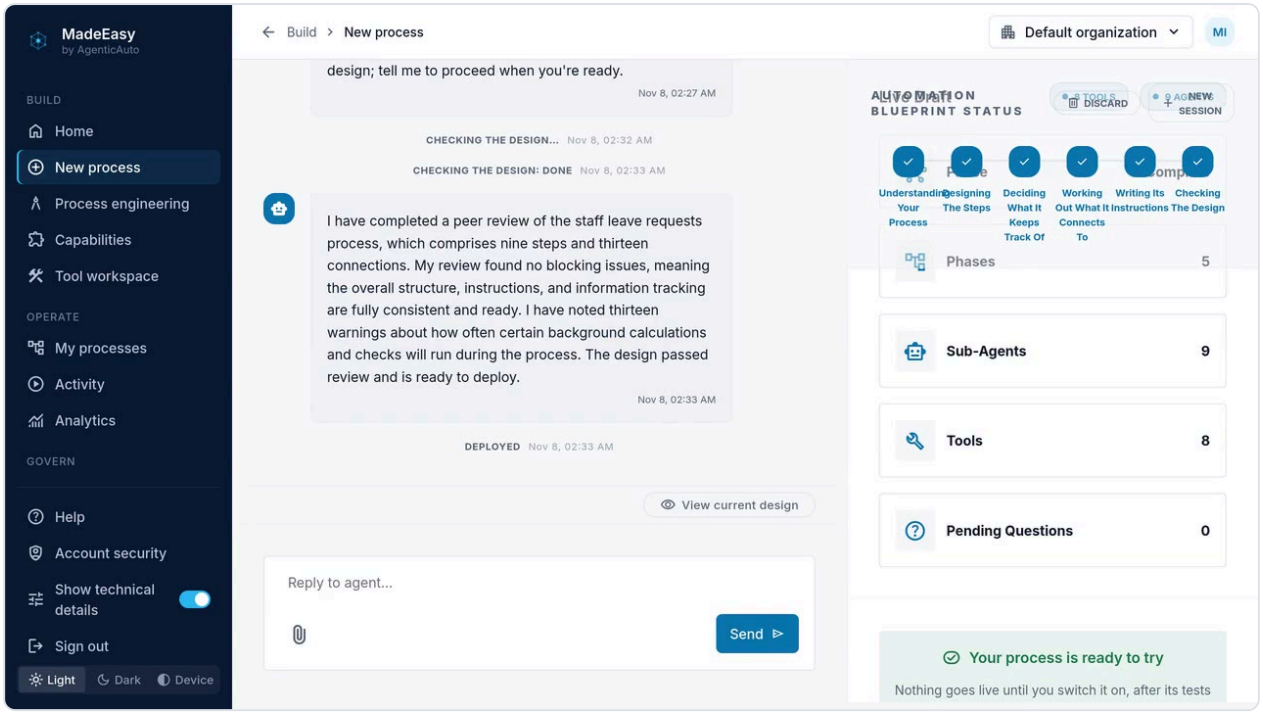


04 Every rule you agreed is kept: a value the customer gives, a limit that must hold, a role that must approve.

05 You look over the design, and approve it in your own words.



06 Any action outside MadeEasy, like sending an email or moving money, runs only when the conditions you agreed are met. Code checks them at every call; the AI cannot skip them.



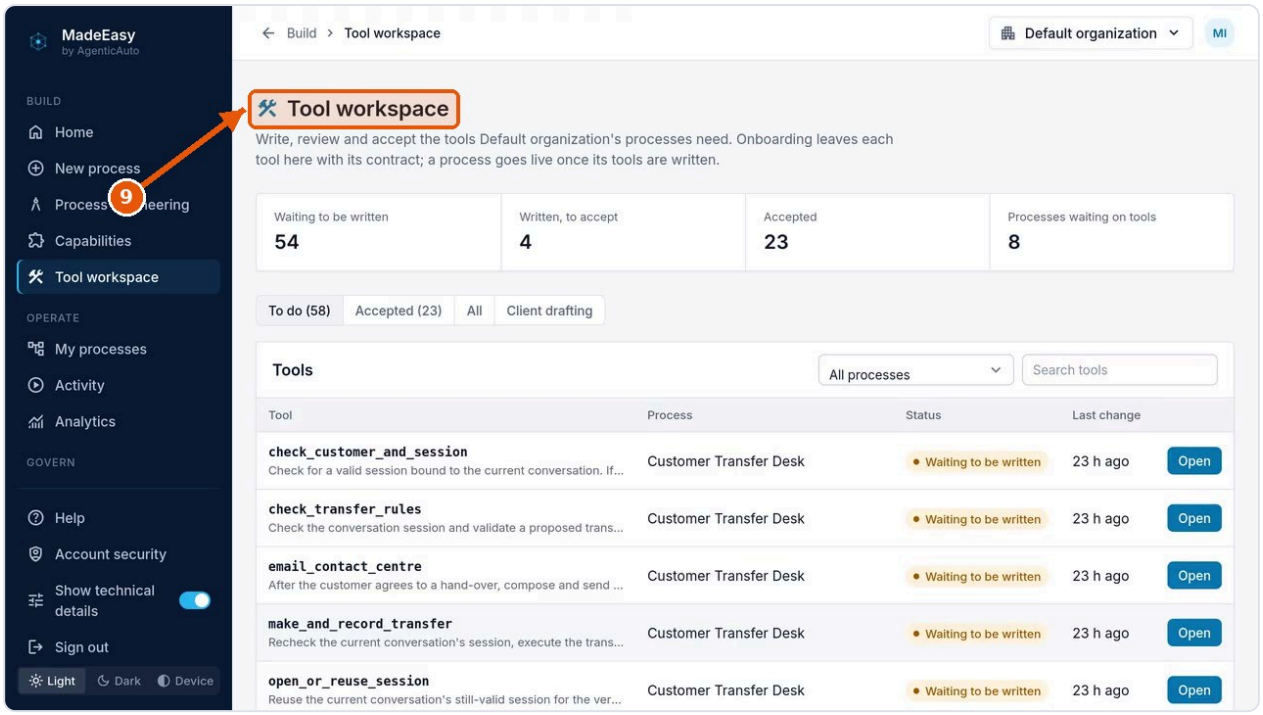
07 Where no AI is needed, there is none. A step that only follows rules runs as code: exact, and at no model cost.

08 The design is checked against the specification. Anything that does not match is sent back and fixed before you see it.

09

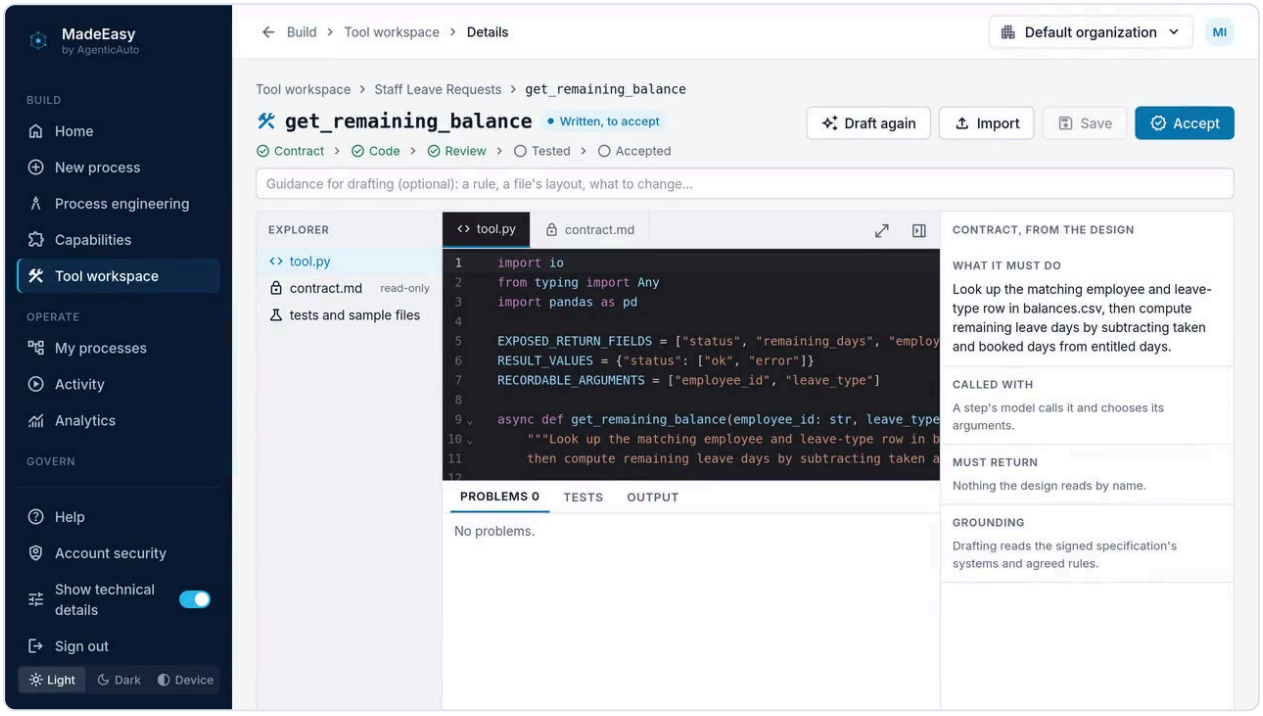
Each tool the process needs is listed, waiting to be built. Let's open the Tool workspace.

Look for **Tool workspace**, marked 9 on the screen.



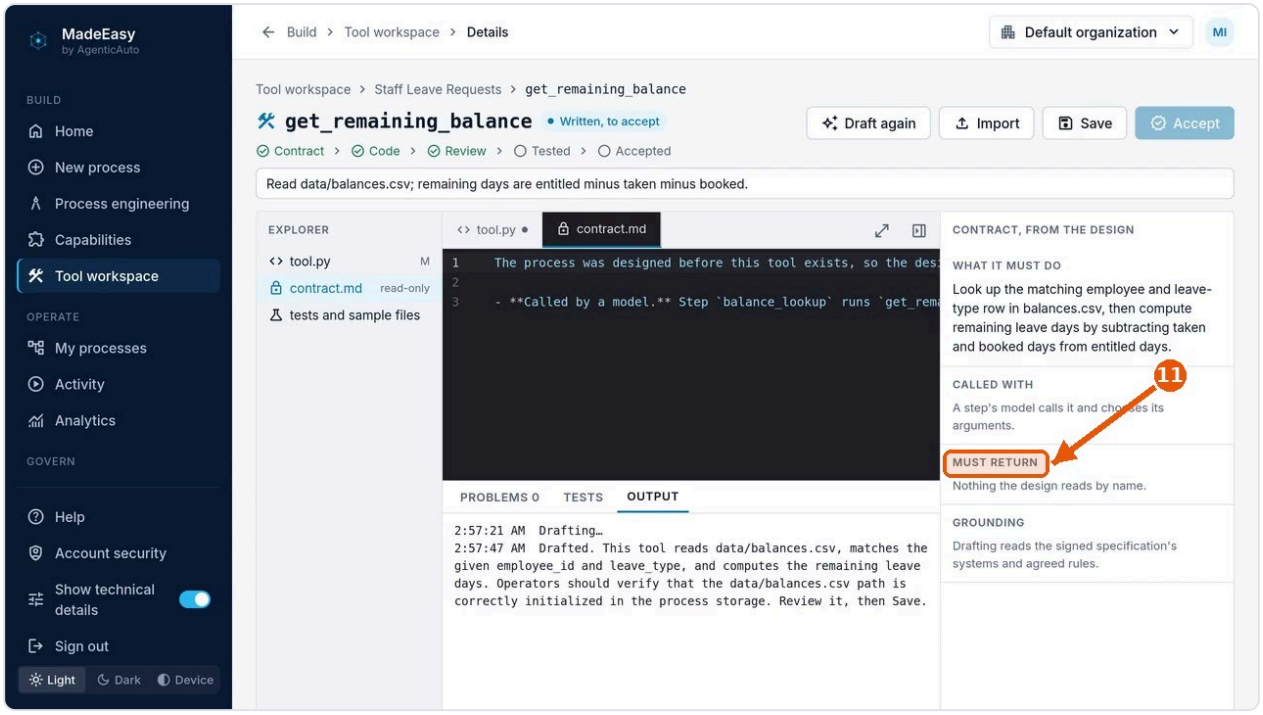
10

A tool is written by a developer, or drafted by the AI with an operator guiding it, from your own documents and sample data.

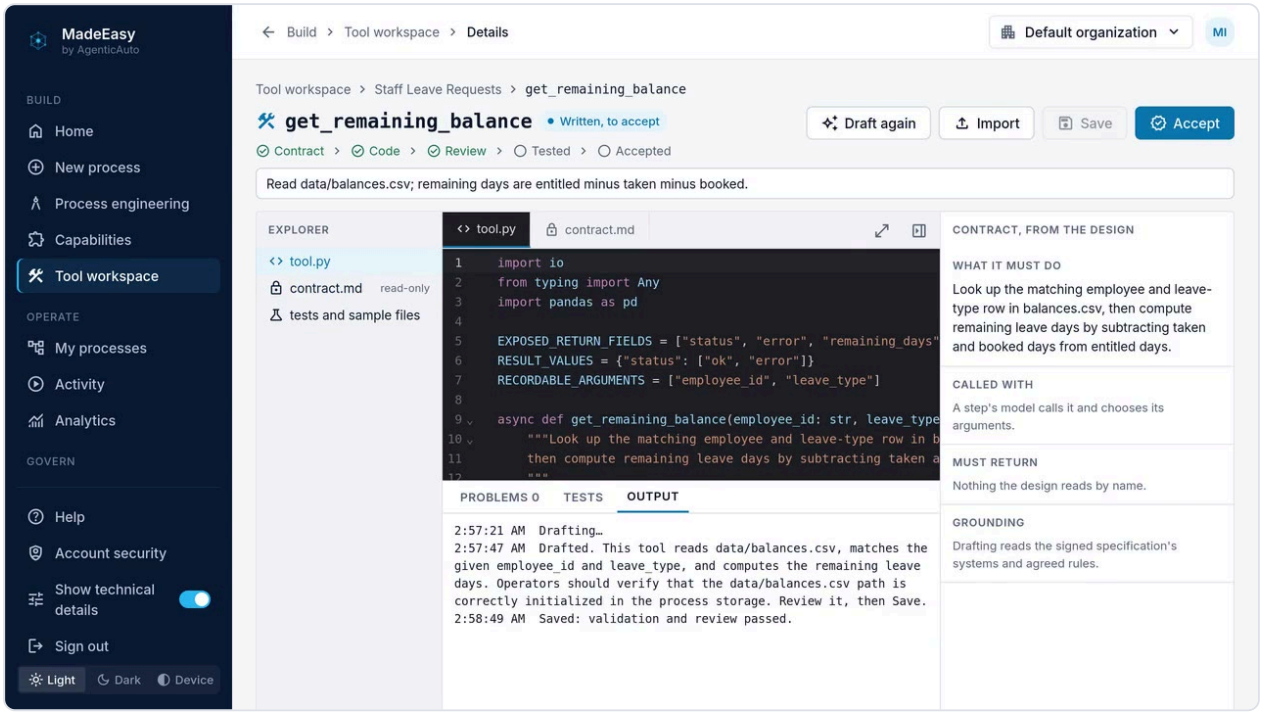


11 The tool's contract says exactly how the process will call it: what it is given, what it must return, and when it may act.

Look for **must return**, marked 11 on the screen.



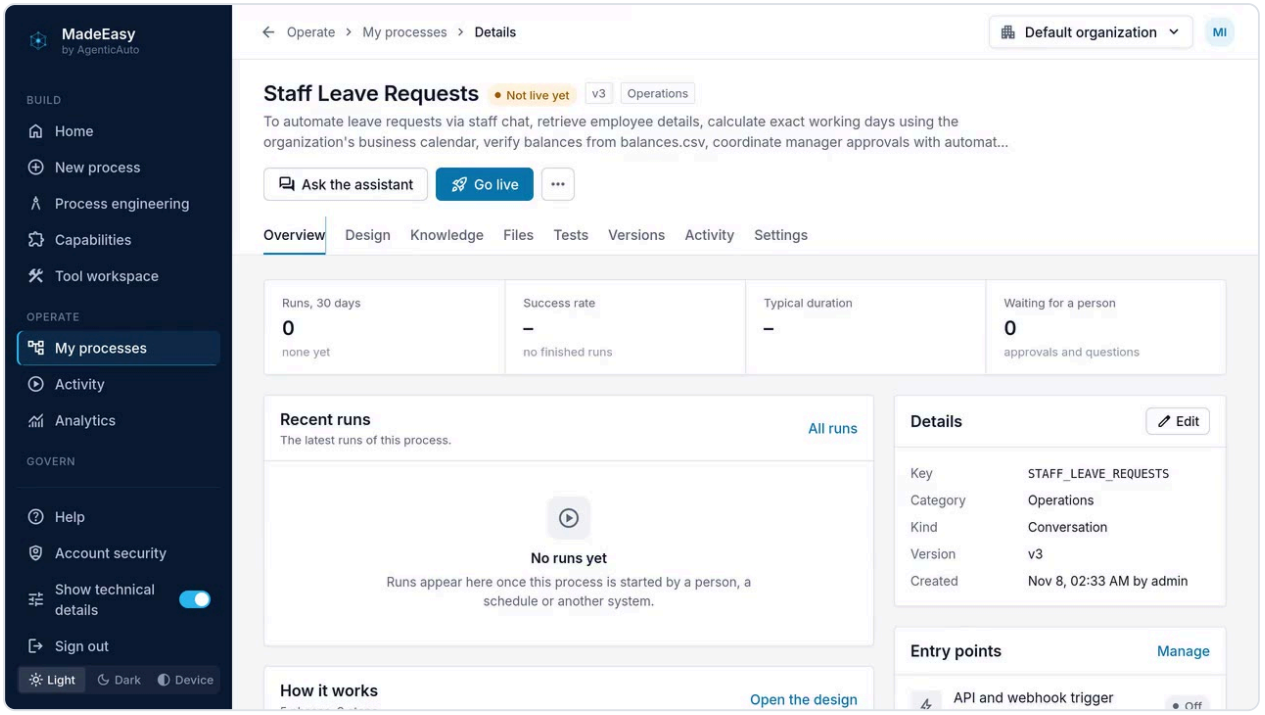
12 Every tool is reviewed for safety and correctness before it can be saved.



13 Then it is tested on cases from your own rules and files. Each case shows what went in, what came out, and any action it would have taken.

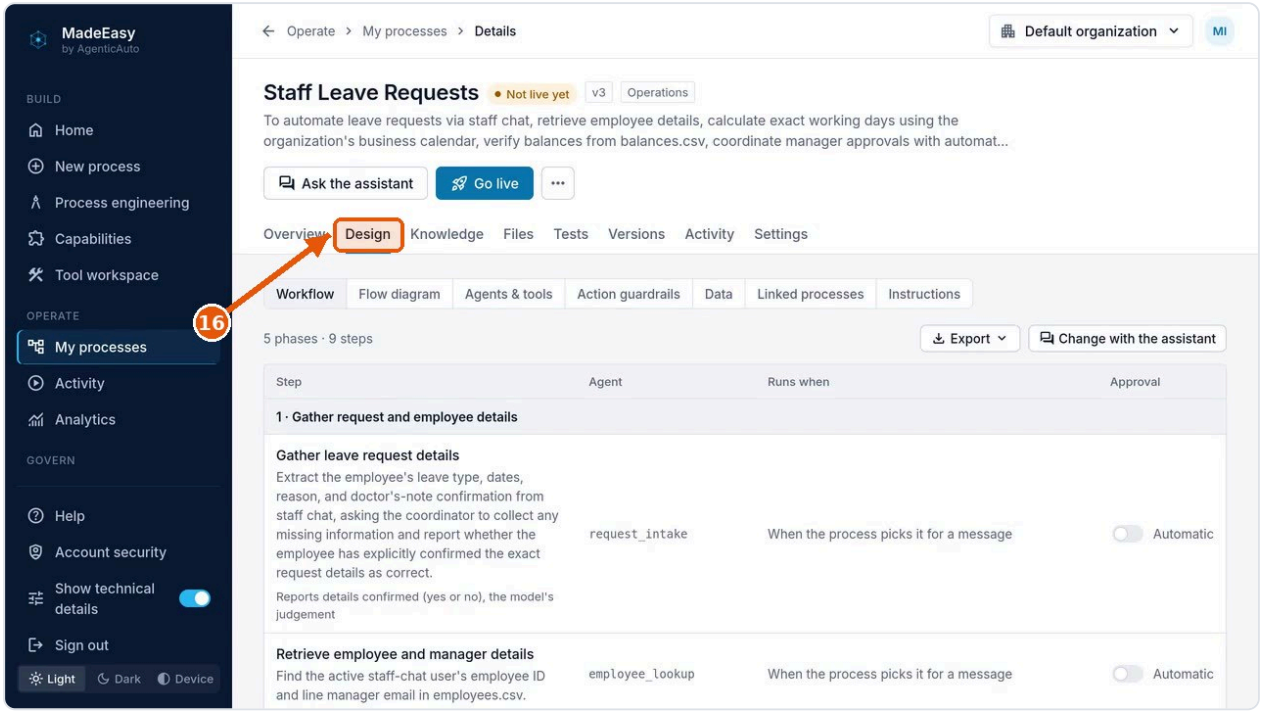
14 When every case passes, the tool is accepted. When every tool is accepted, the process is ready.

15 The process is deployed as a candidate. It exists, it can be tested, but it is not live yet.



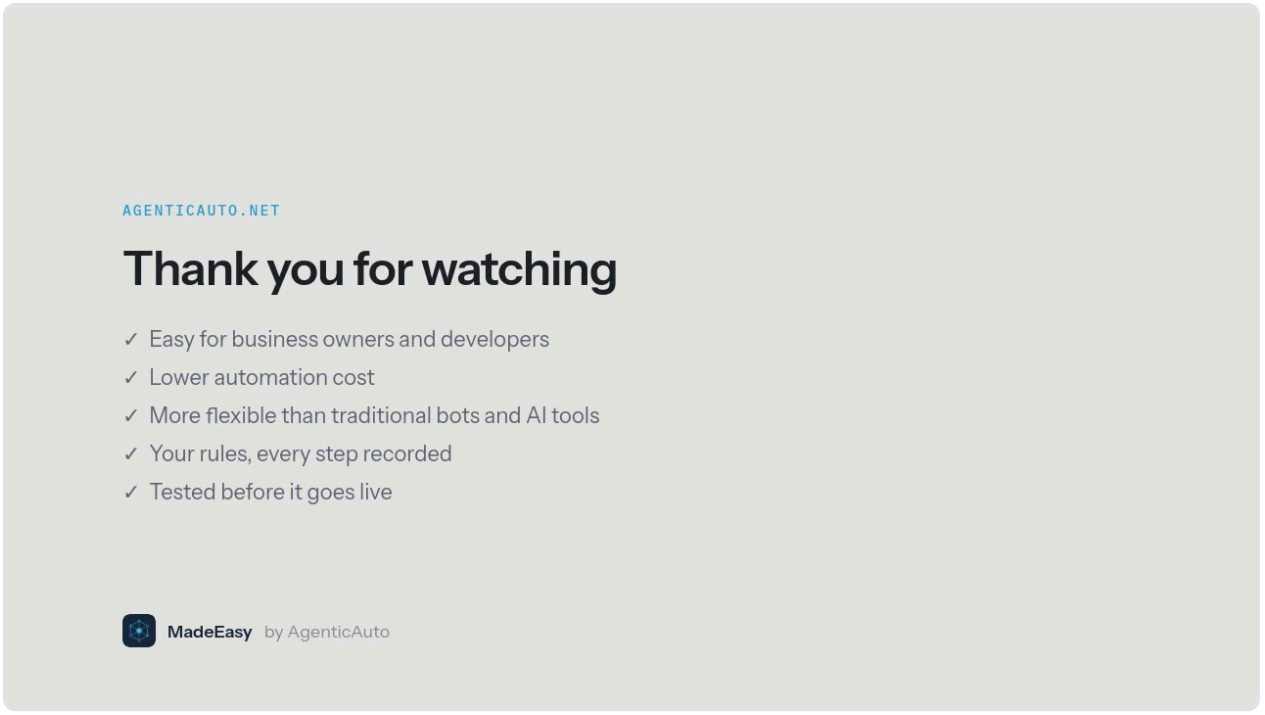
16 Its Design tab now shows the whole process as it will run, step by step.

Look for **Design**, marked 16 on the screen.



17 Next, it is tested as a whole, and it goes live only when those tests pass.

18



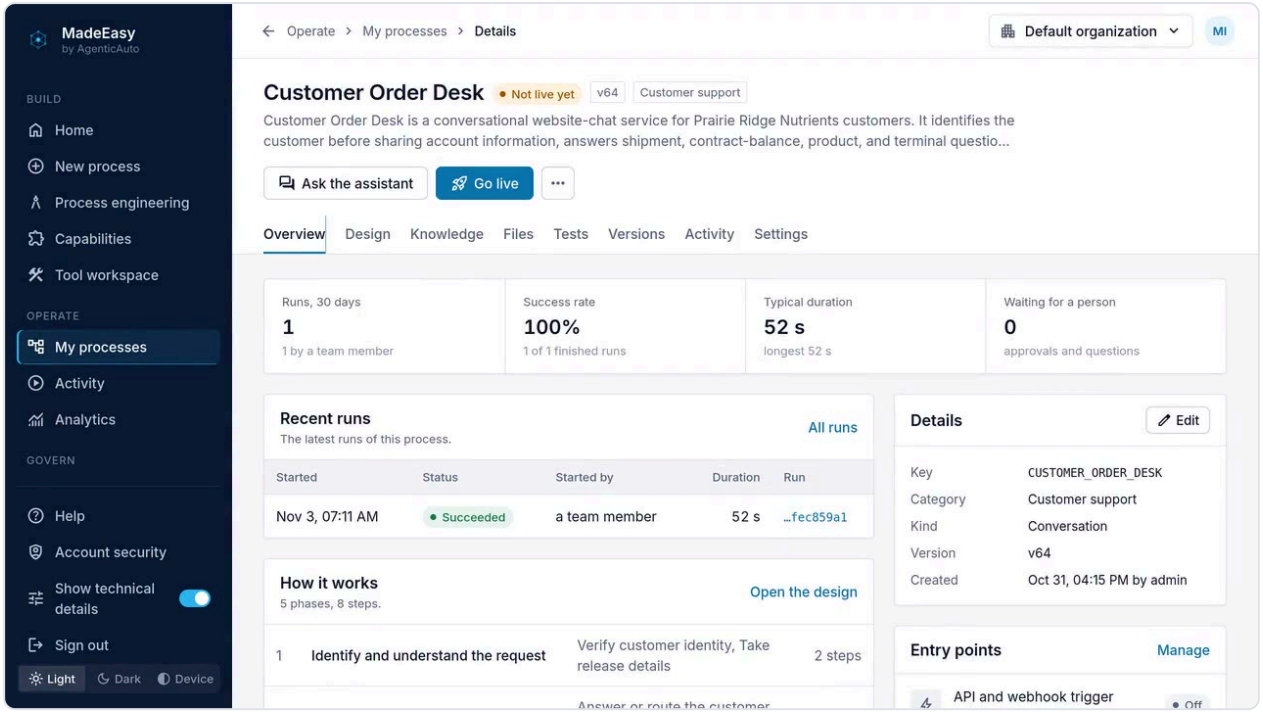
CHAPTER 4

Changing a process with its assistant

Ask, propose, approve: every change becomes a new version you can look back on.

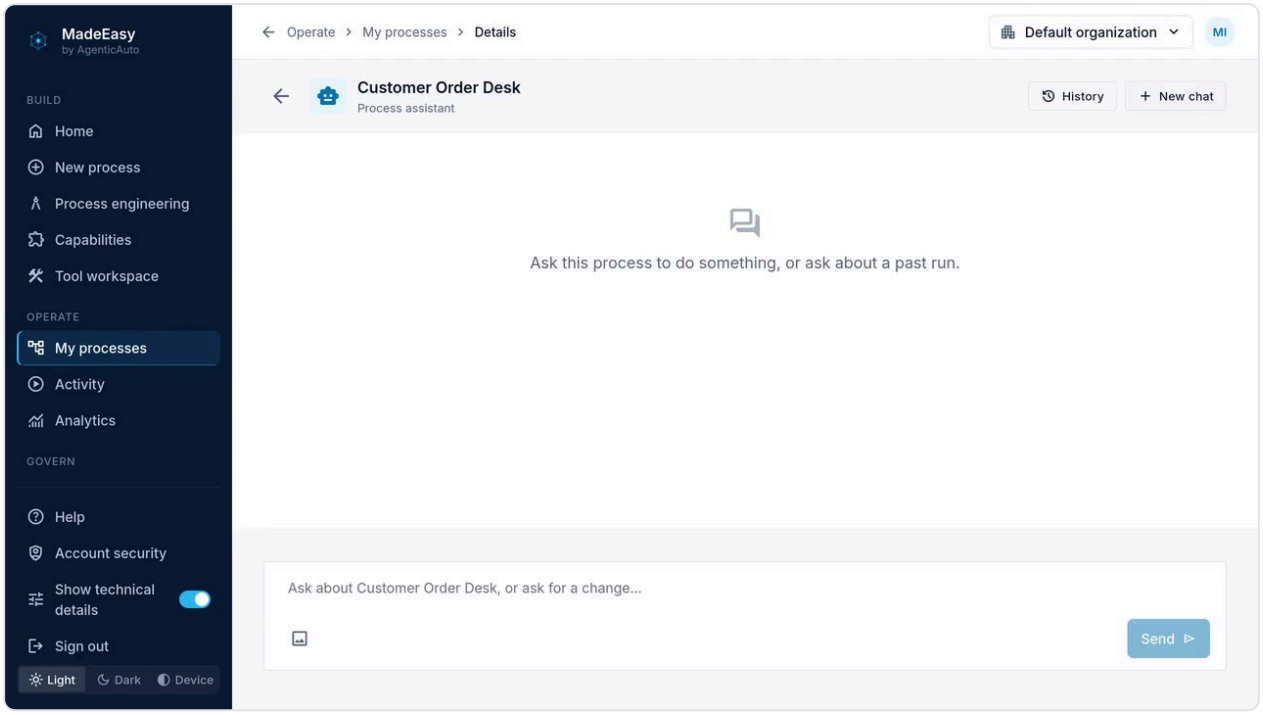
01

Processes change: a new rule, a new approver, a different place to send a report. Every change goes through the process's own assistant.

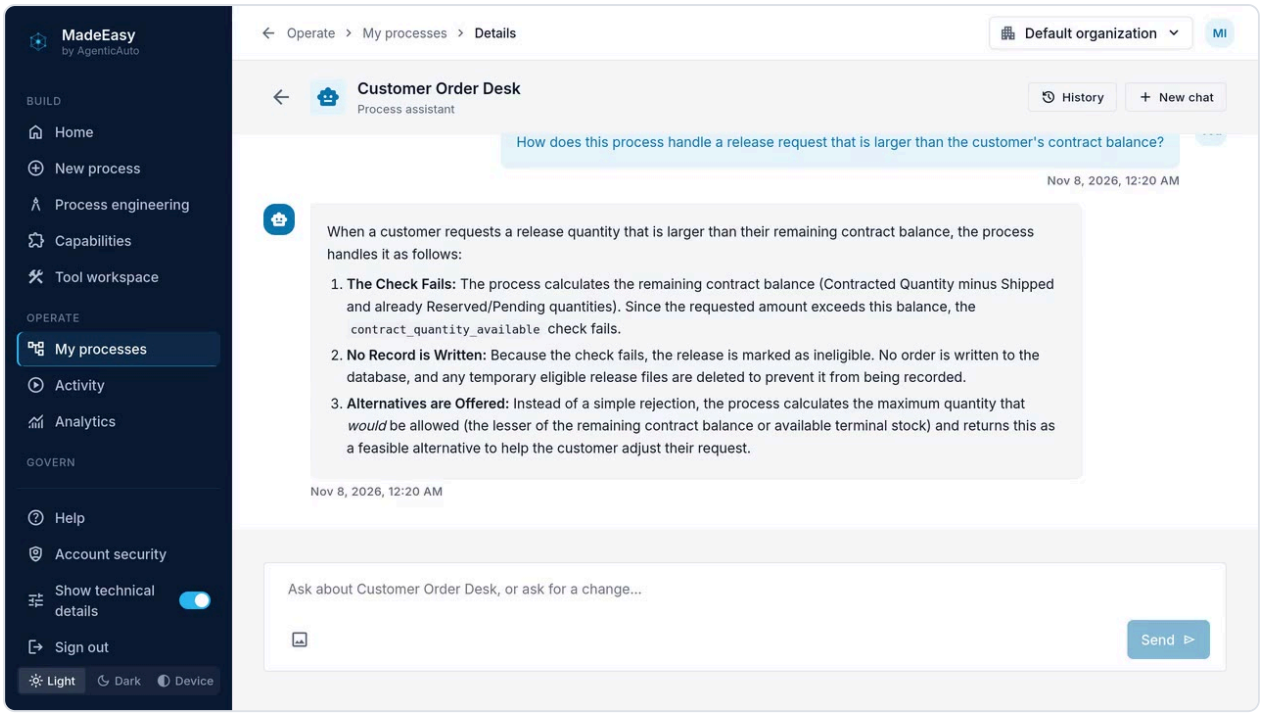


02

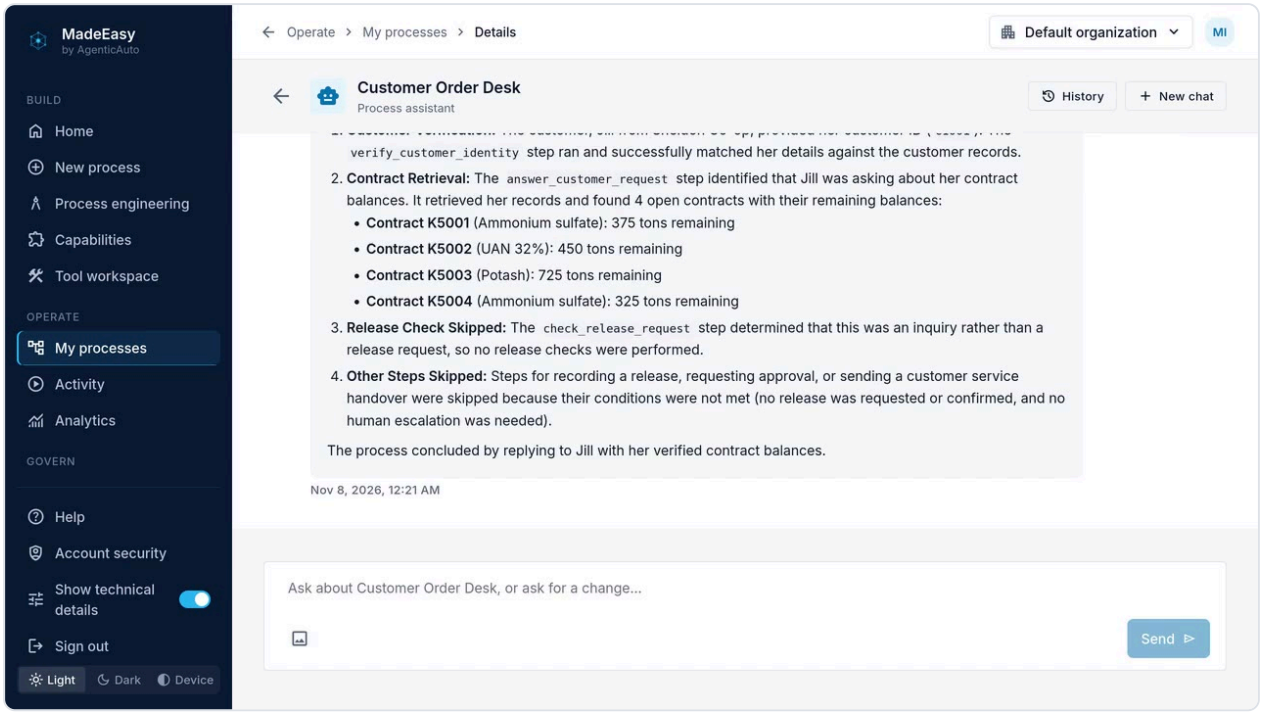
Open a process, and open its assistant.



03 Start with a question. Ask how the process handles a case, and the assistant answers from the process's real design.

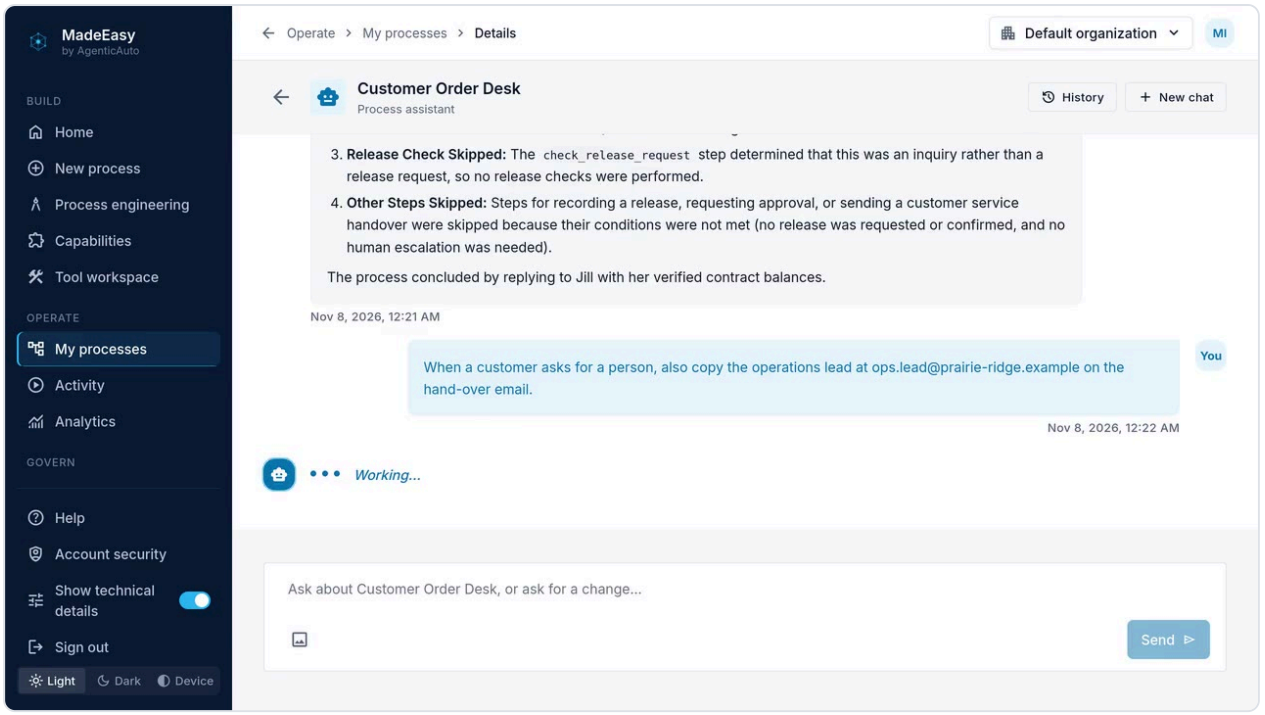


04 Ask why a run did what it did, and it reads that run's record and explains it, step by step.

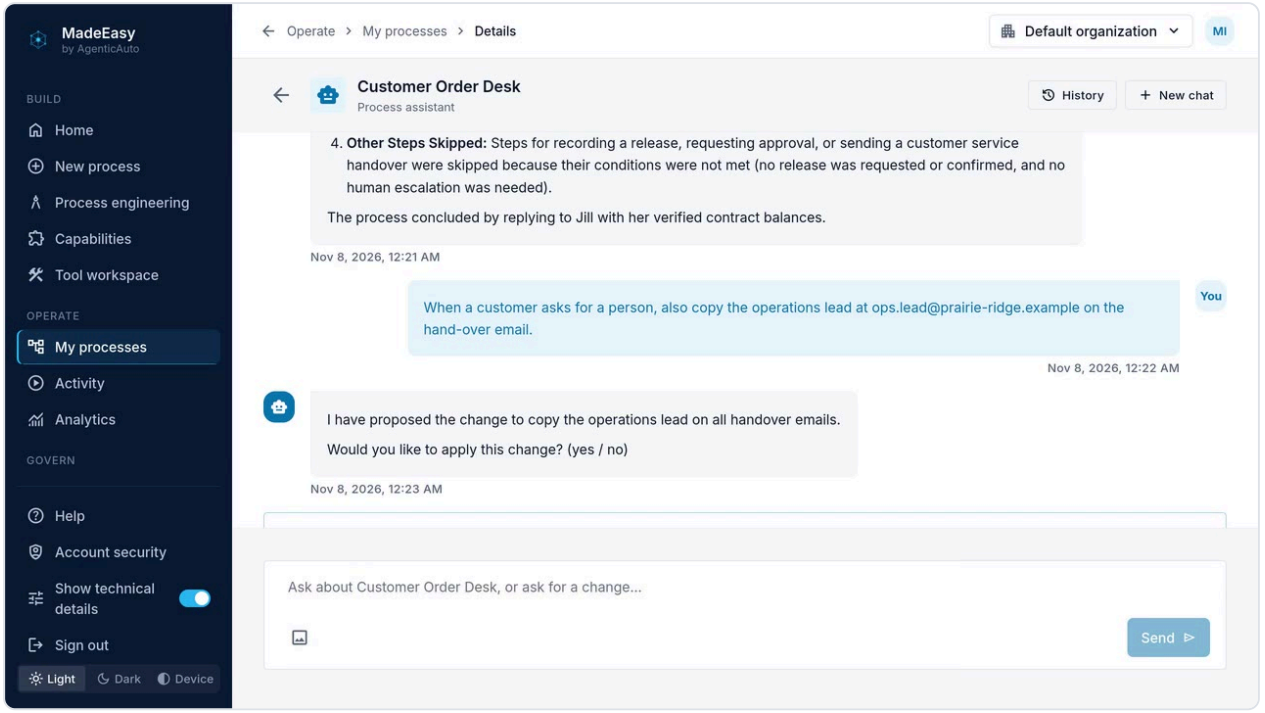


05 Now ask for a change, in plain words. For example: when a customer asks for a person, copy the operations lead as well.

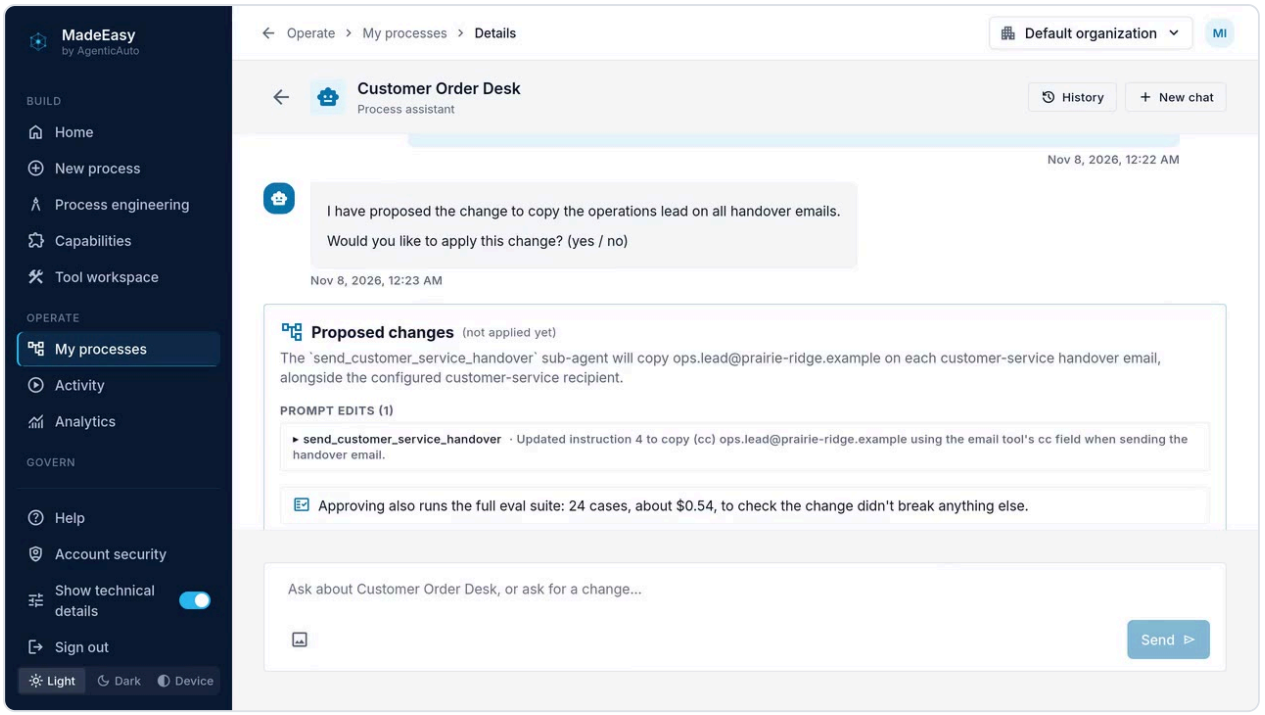
06 The assistant reads the design before changing anything. If the process already does what you asked, it tells you where, and changes nothing.



07 If the change would undo something the design does on purpose, it explains the trade-off and leaves the decision to you.

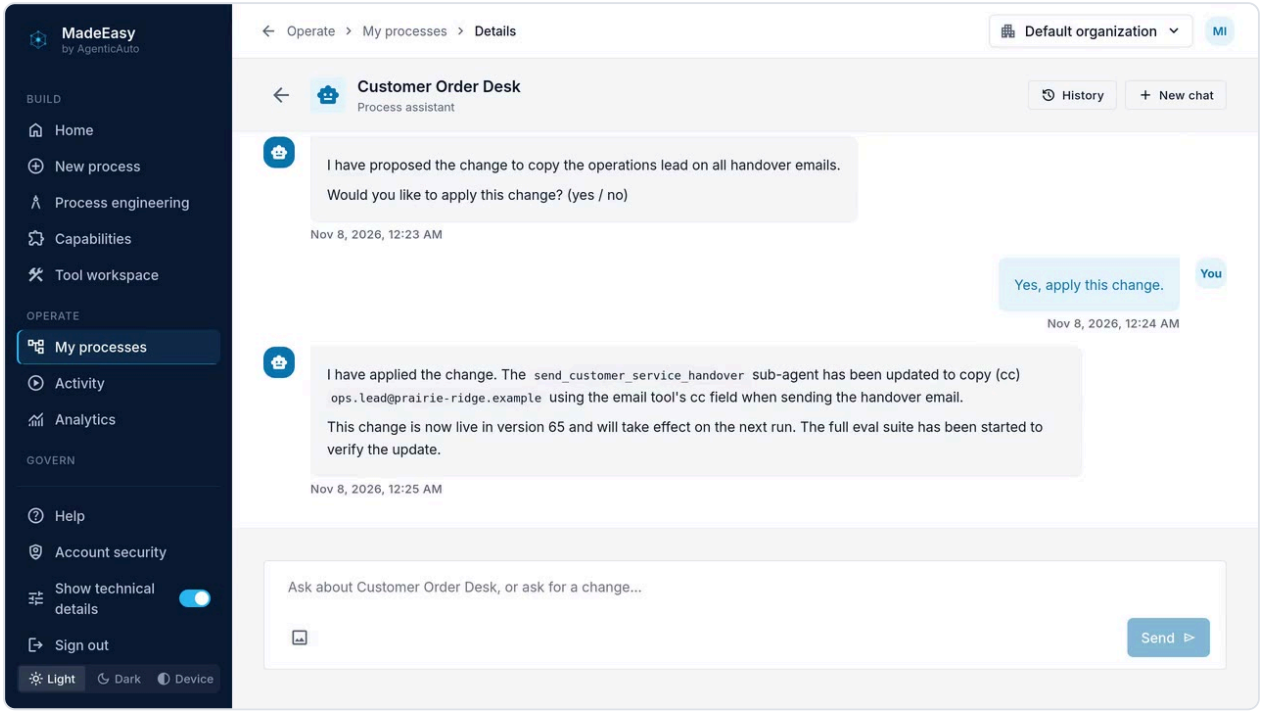


08 Otherwise, it proposes the change: each part of it, and any instruction it would rewrite, in full.



09 Nothing is applied yet. Read it, ask about it, or ask for something different.

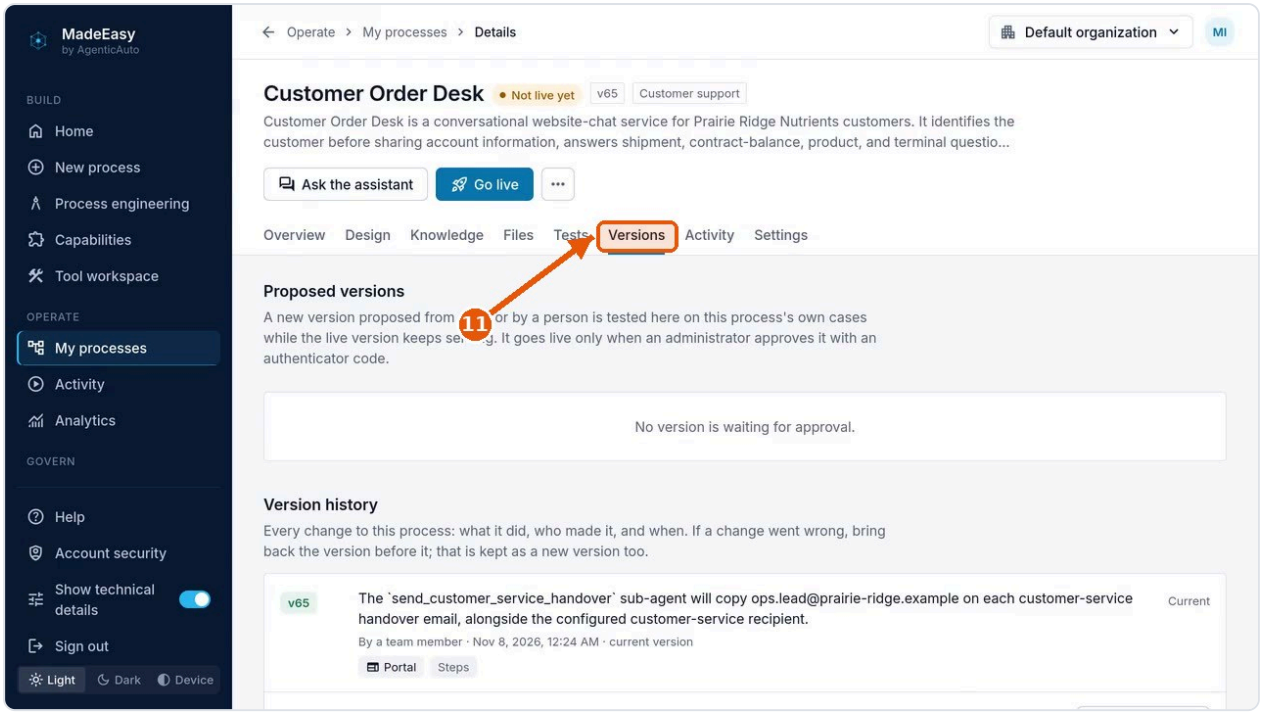
10 When you are happy, approve it in your own words. The change is applied as a new version.



11

Versions shows every change: what it did, who made it, and when. If a change went wrong, an earlier version can be brought back.

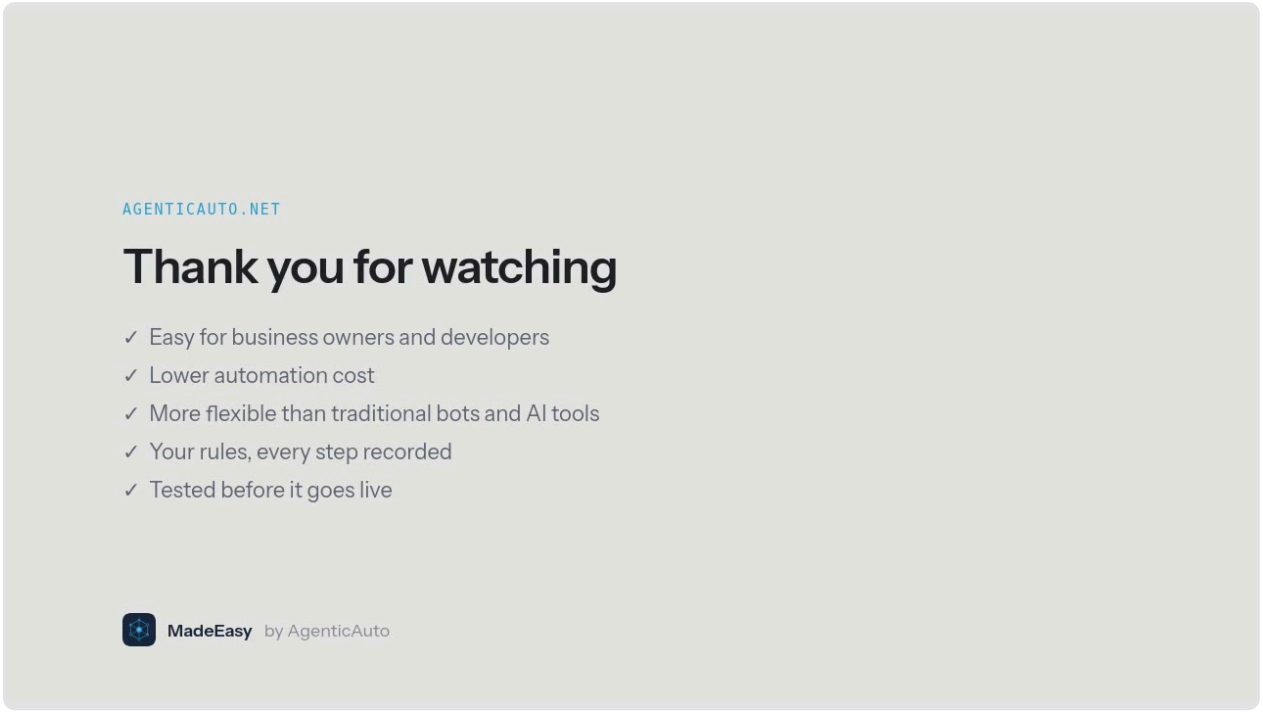
Look for **Versions**, marked 11 on the screen.



12

A change to a live process is tested before it goes live, so the version your customers use is always one that passed.

13



CHAPTER 5

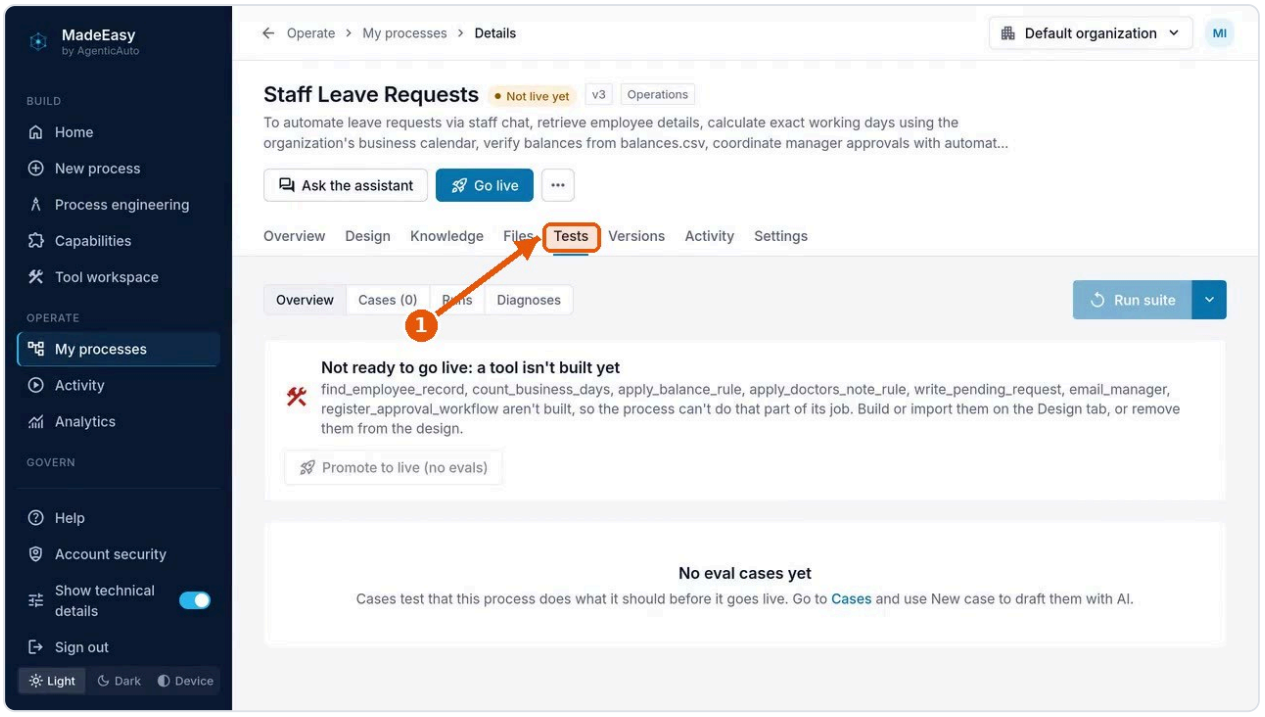
Testing a process before it goes live

Cases that check what a run does, before any version goes live.

01

A process goes live only after it passes its tests. Its test cases live on its Tests tab.

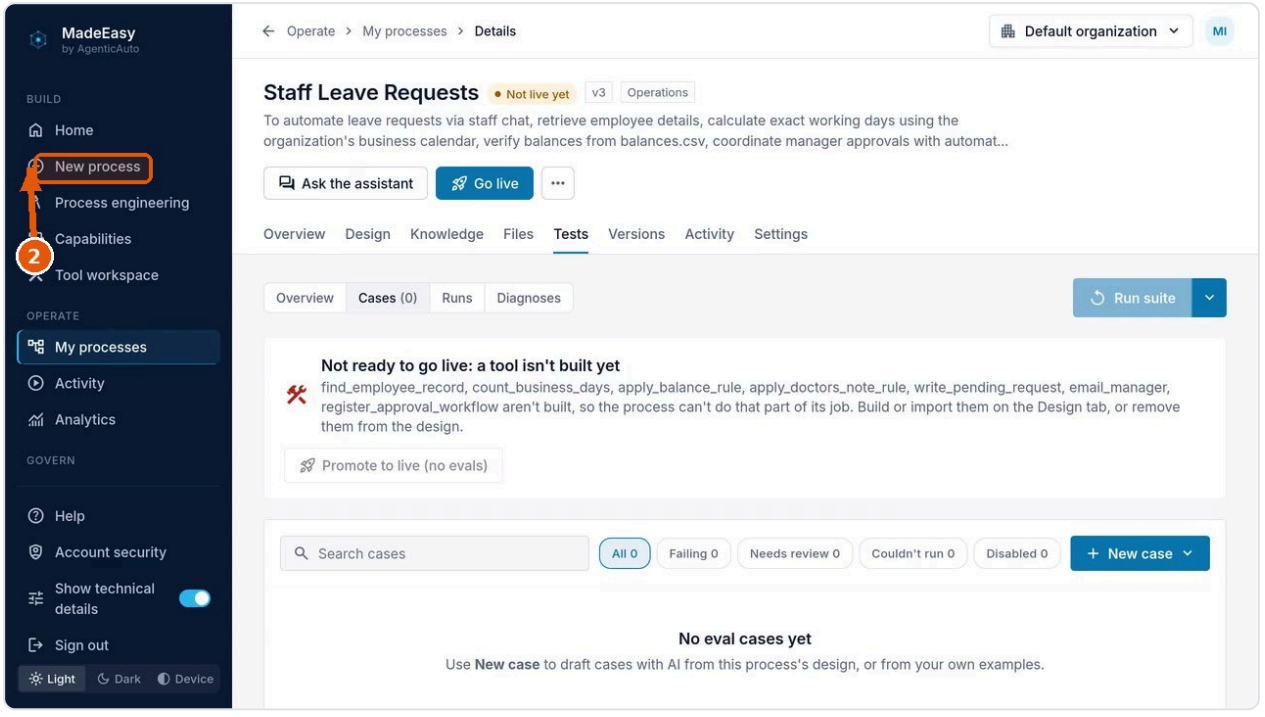
Look for **Tests**, marked 1 on the screen.



02

A new process has none. You choose how to make them: draft them with AI, or write your own.

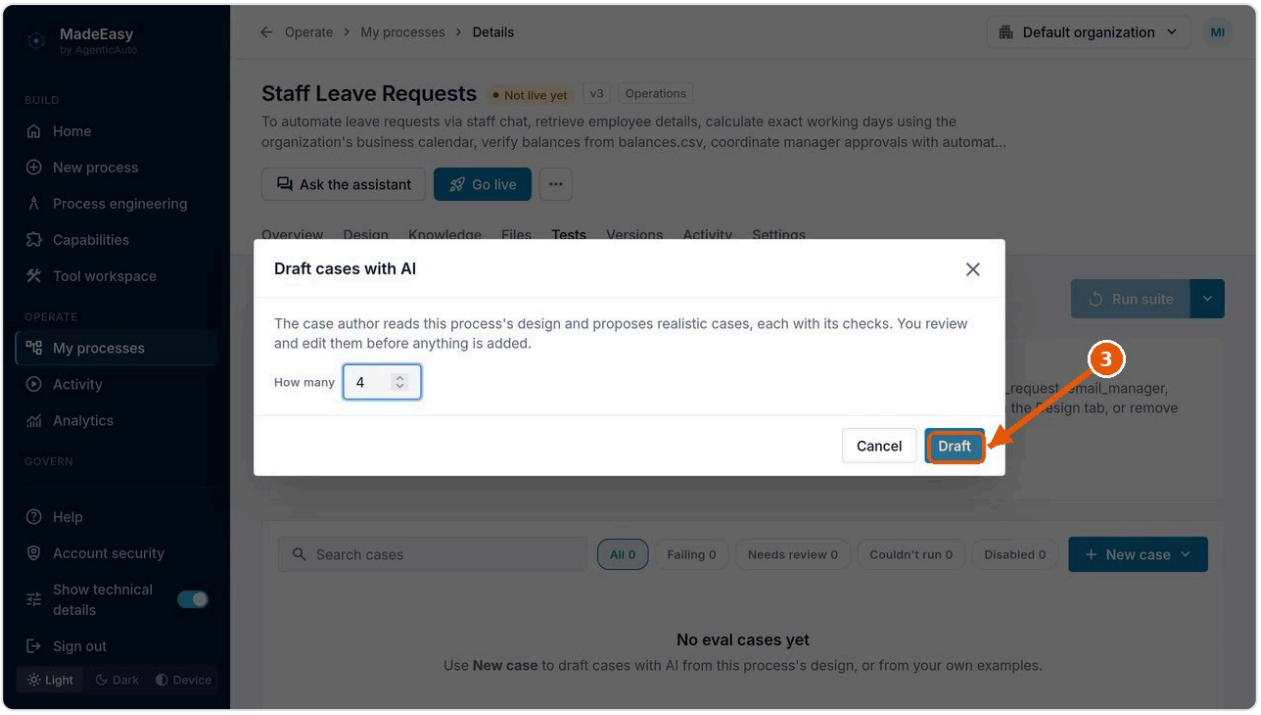
Look for **new process**, marked 2 on the screen.



03

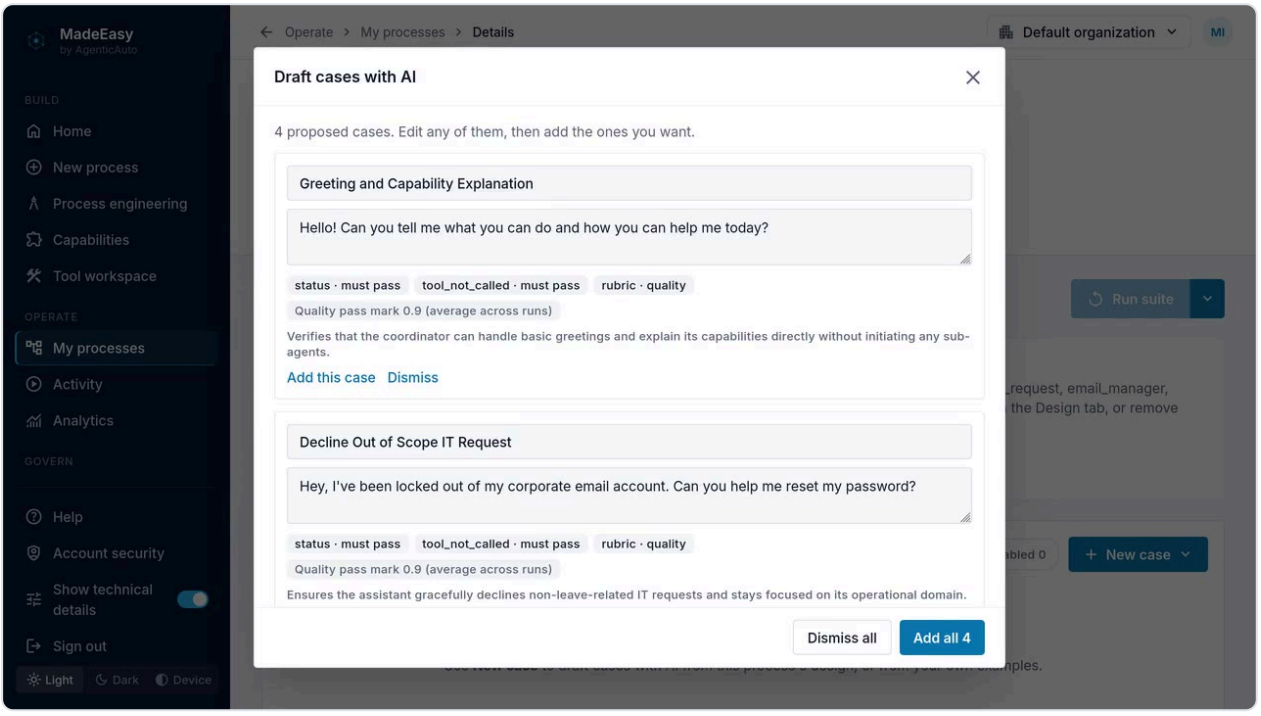
Draft cases with AI reads the process's design and proposes cases across its paths: the usual case, the exceptions, and the hand-overs.

Look for **Draft**, marked 3 on the screen.



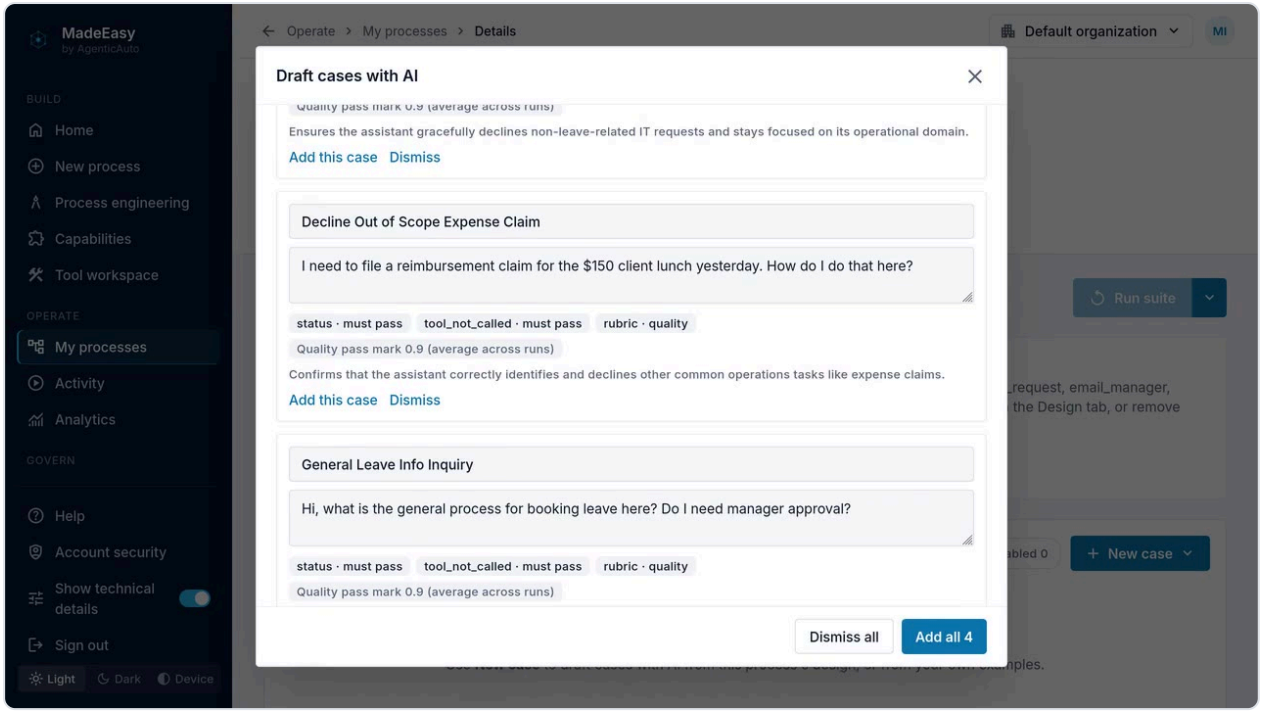
04

Or give it examples from your own work, and it drafts a case from each one.



05

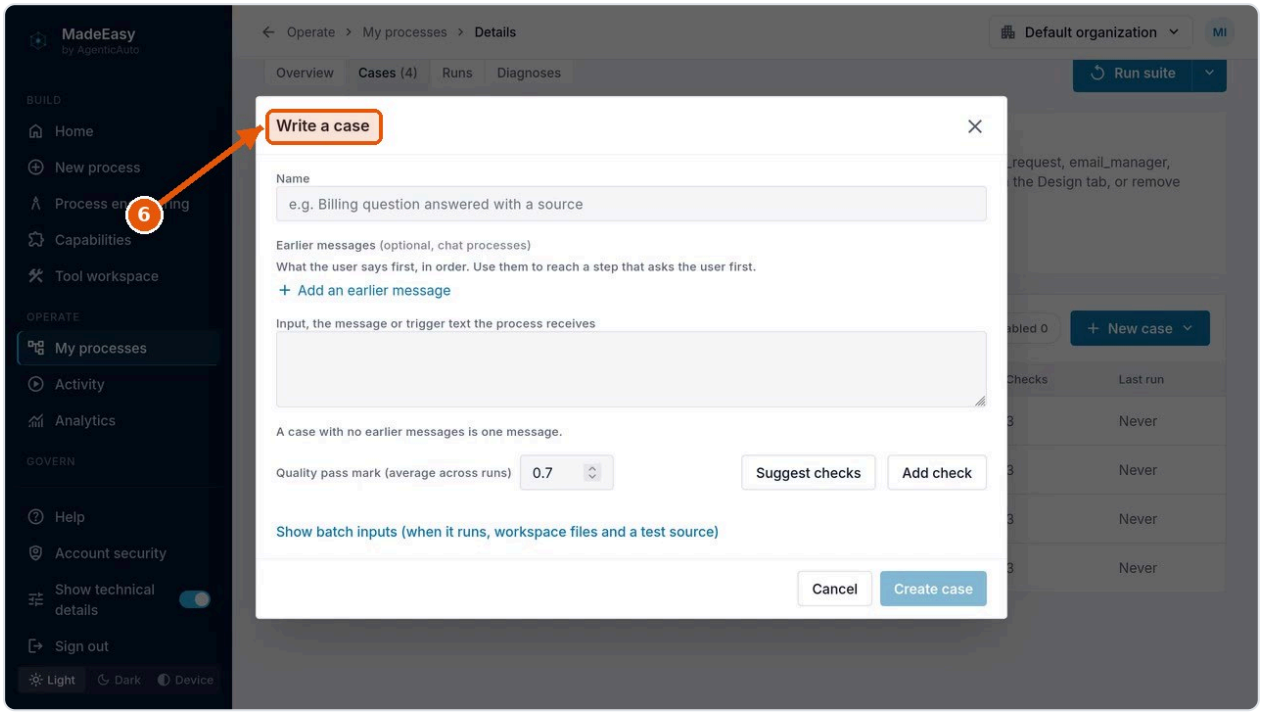
Every drafted case waits for your approval. Keep it, change it, or drop it.



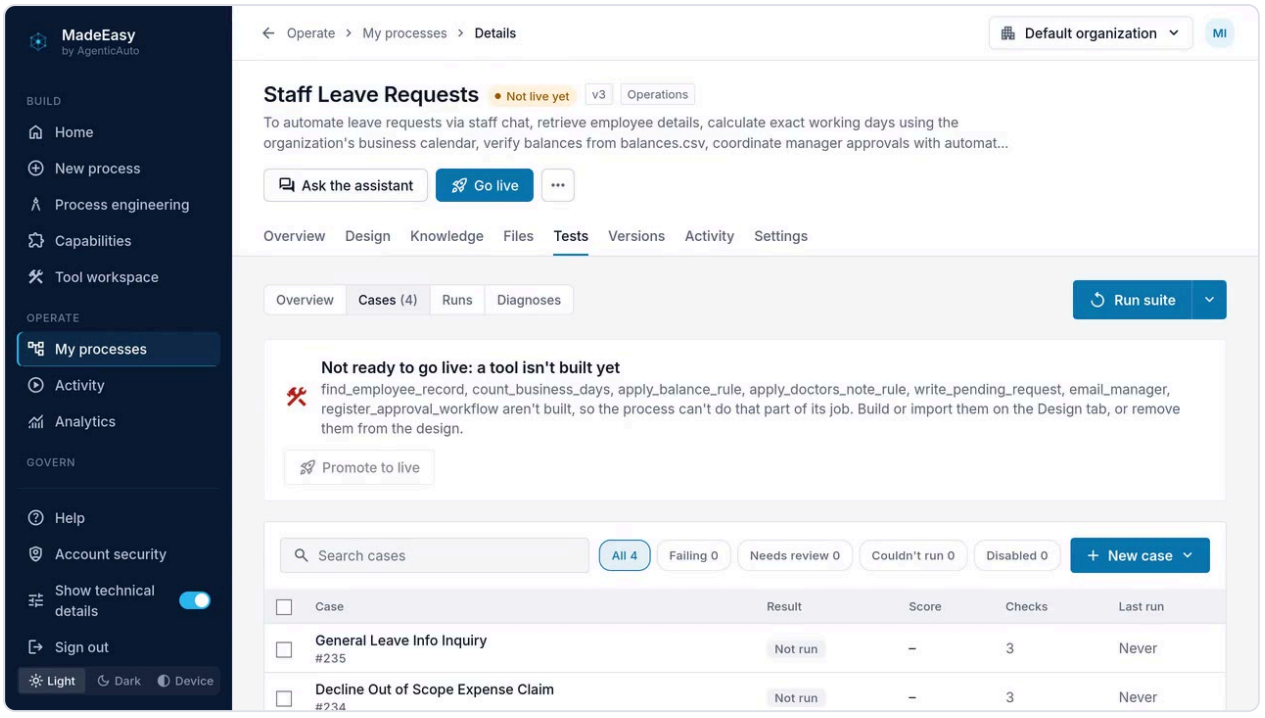
06

You can also write a case yourself: what the run is given, the moment it runs at, and the files it starts with.

Look for **write a case**, marked 6 on the screen.

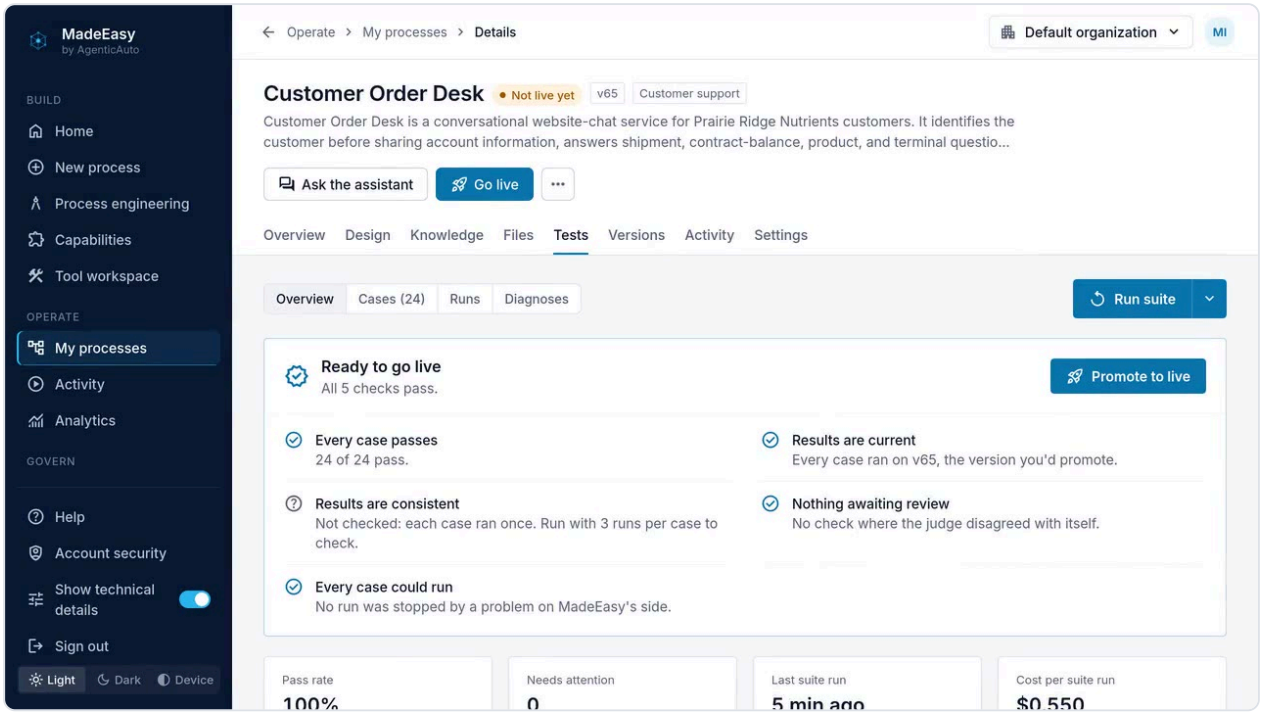


07 Each case says what must happen: which tools are called, with what, and which decisions are made. That is what decides a pass.



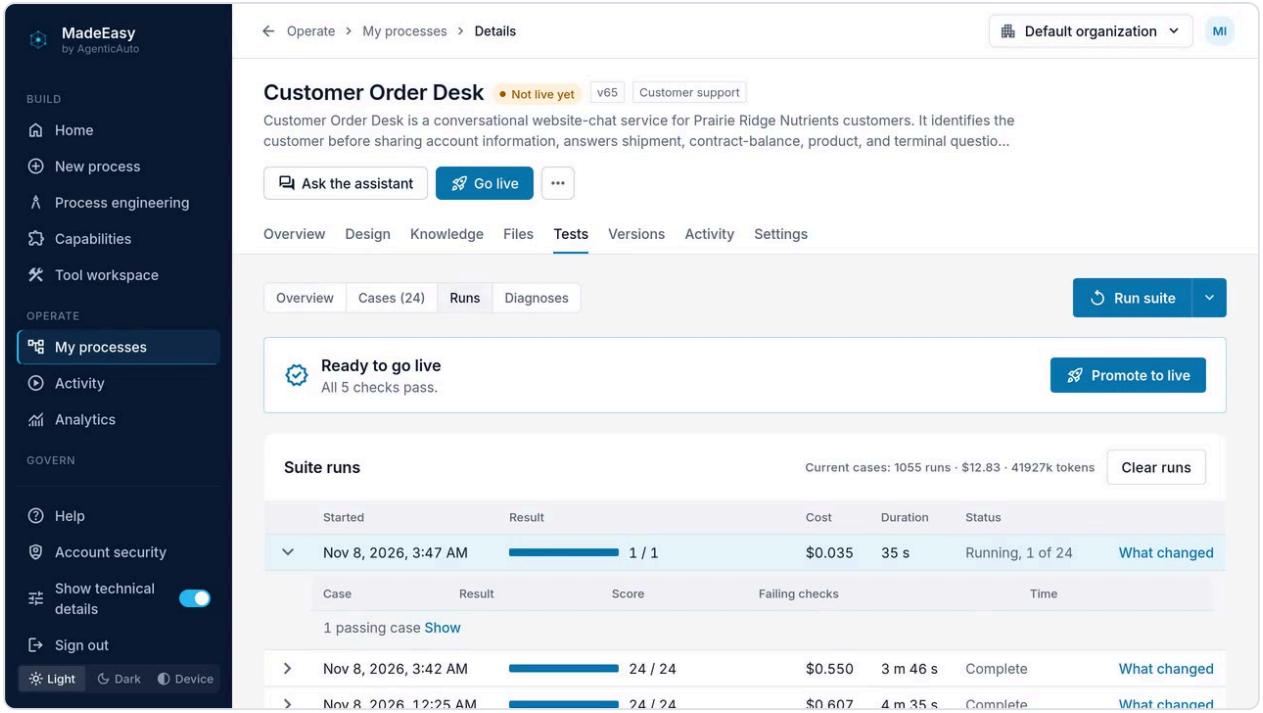
08 The wording of a reply is scored too, but a good run is never failed for phrasing alone.

09 Here is a process whose tools are all built, with its cases in place.



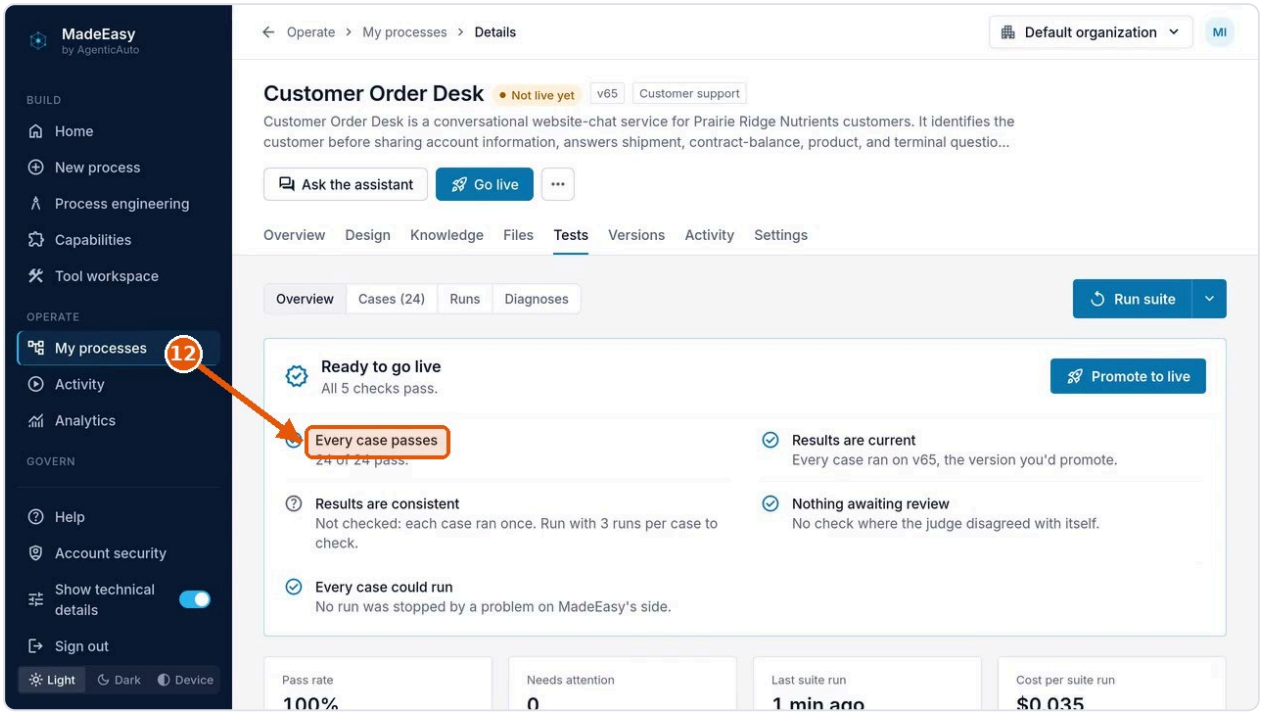
10 Run the cases. Each one runs the real process at the moment and with the files the case sets, recorded apart from your live runs.

11 Each result shows what the run did, and where it differs from what the case expected.



12 Here every case passes. When cases fail, Fix with assistant groups the failures by their cause, proposes one fix for each, and runs the cases again once you approve.

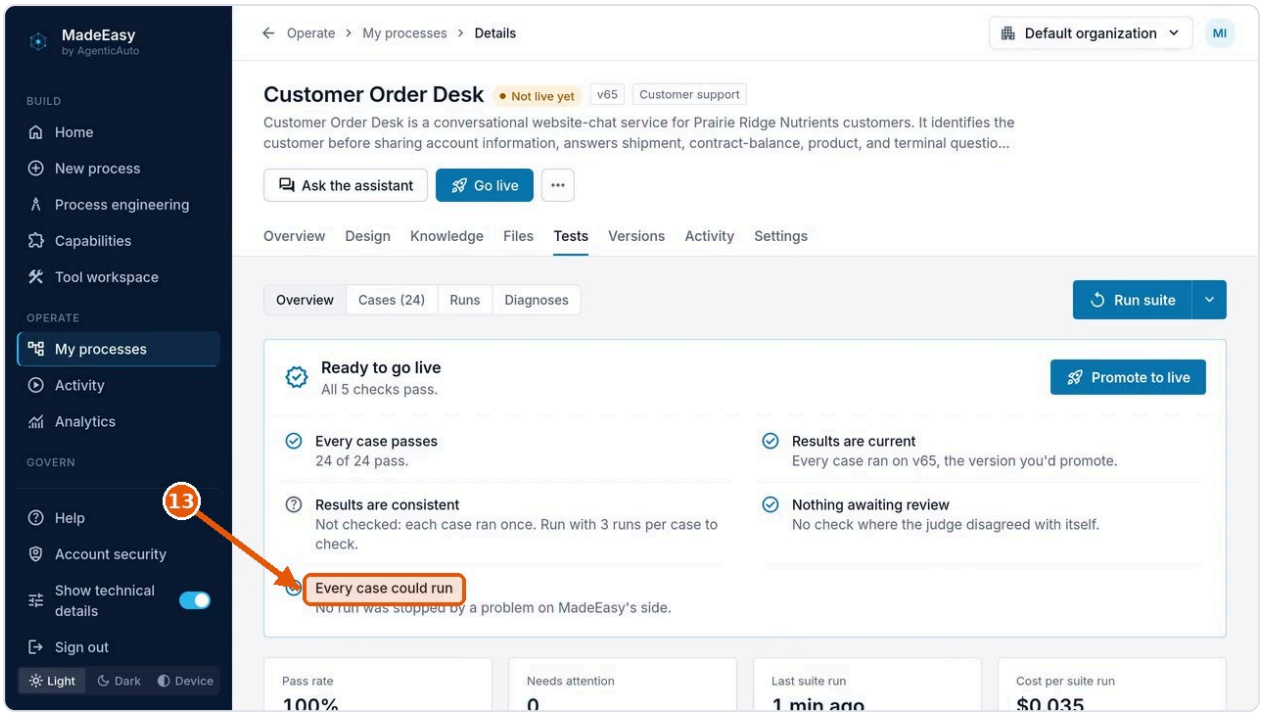
Look for **case passes**, marked 12 on the screen.



13

The readiness card shows what is left: every case could run, and every case passes.

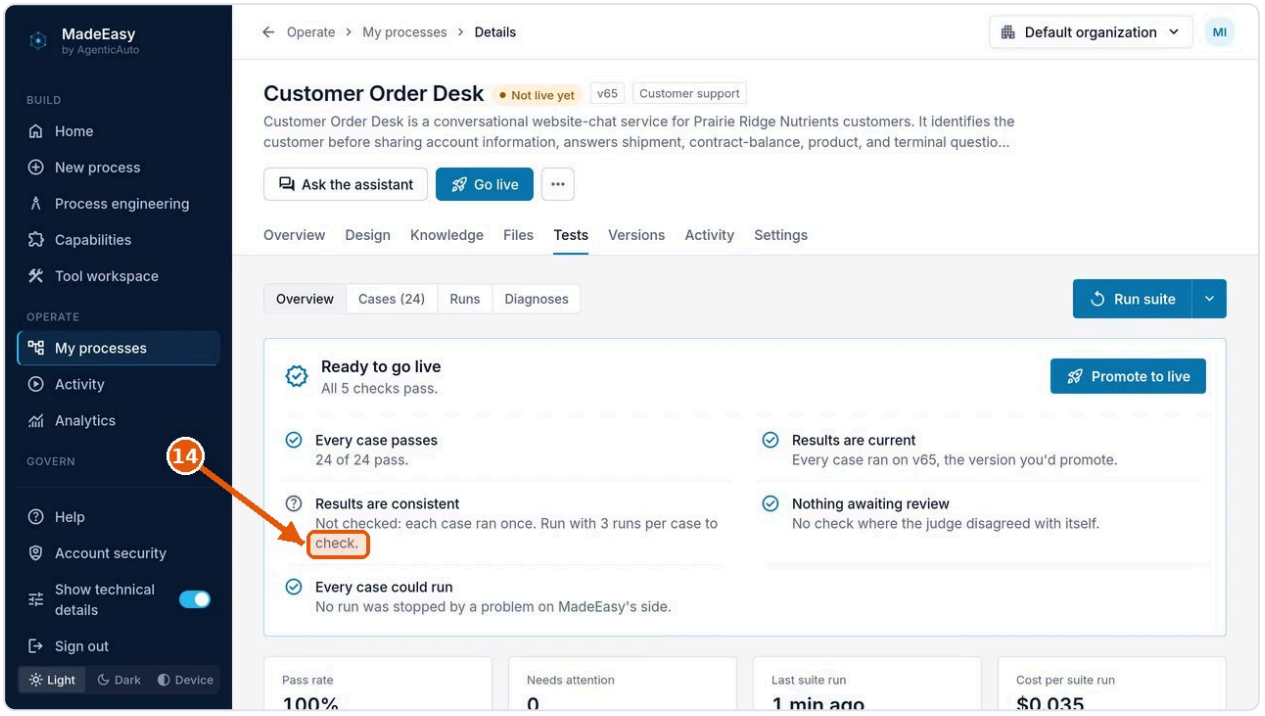
Look for **case could run**, marked 13 on the screen.



14

When every blocking check passes, the process can go live.

Look for **check**, marked 14 on the screen.

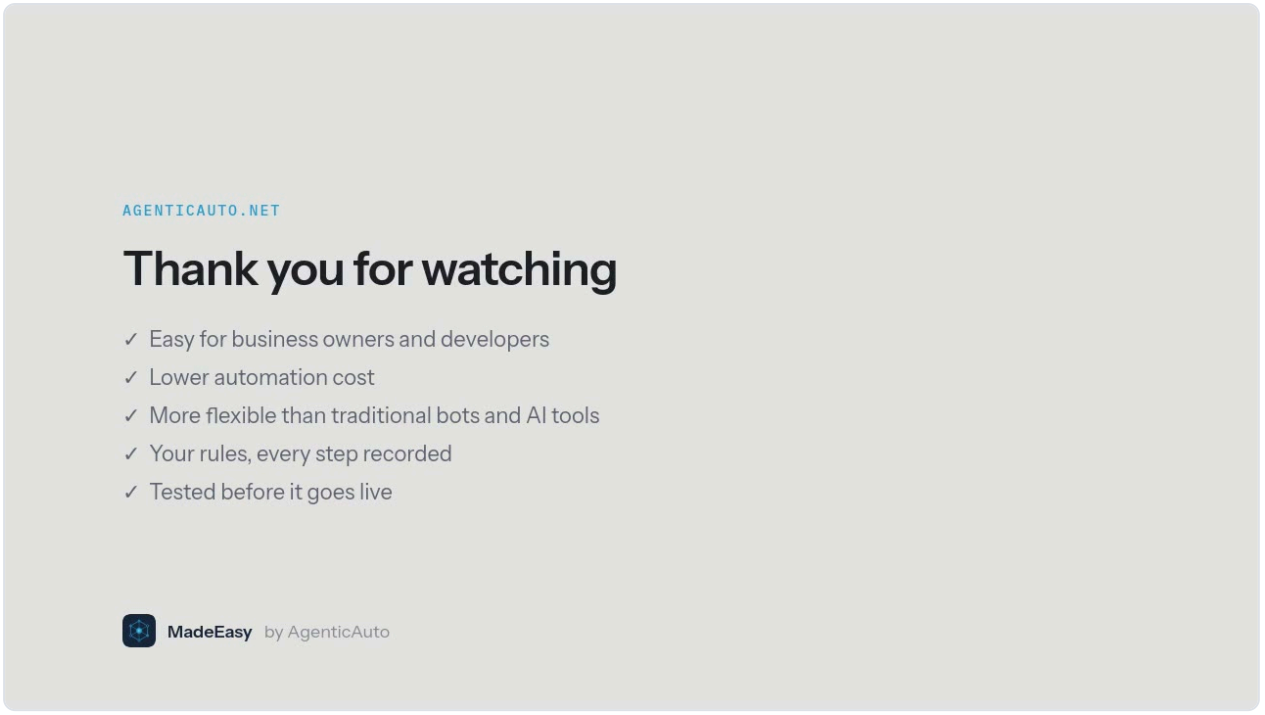


15

Promote it, and that version becomes the one your customers and your team use.

16 From now on, every change is tested the same way before it goes live.

17



Glossary

Process	A piece of your team's work that MadeEasy runs: its steps, decisions, tools and approvals.
Specification	The agreed, signed description of how a process works, written with the process analyst.
Process analyst	The assistant in Process engineering that drafts the specification and asks only what is missing.
Tool	Code a process uses to read or change something in your systems: a file, a database, a mailbox.
Capability	A shared tool every process can use, such as the business calendar or sending email.
Contract	What a tool must do, what it is given and what it returns, taken from the process's design.
Candidate	A deployed process that can be tested but is not live yet.
Test case	A scenario the process must handle, with checks on the tools it calls and the decisions it makes.
Version	Each approved change to a process. Earlier versions are kept and can be brought back.
Portal / Code	How a change was made: by a person signed in, or from code with an API key.