

A PICTURE-FIRST GUIDE FOR YOUR TEAM

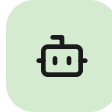
Get the best out of Odokai

Odokai gives your team AI agents that do real work. This guide shows the eight building blocks, what they do for a team, how you stay in control, and where to start.



Sessions

Conversations with your agent



Agents

Who does the work



Skills

Know-how it follows



Connectors

The services it uses



Data Sources

Your data, queried



Schedules

Work on a timetable



Plans

Long jobs, step by step



Apps

Tools your team opens

WHAT IS INSIDE

1



Building blocks

The eight pieces, and how they fit together

Pages 2–12

2



At work

What agents take on, and what your people keep

Page 13

3



In your control

Roles, approvals, your data, the audit trail, your own stack

Pages 14–18

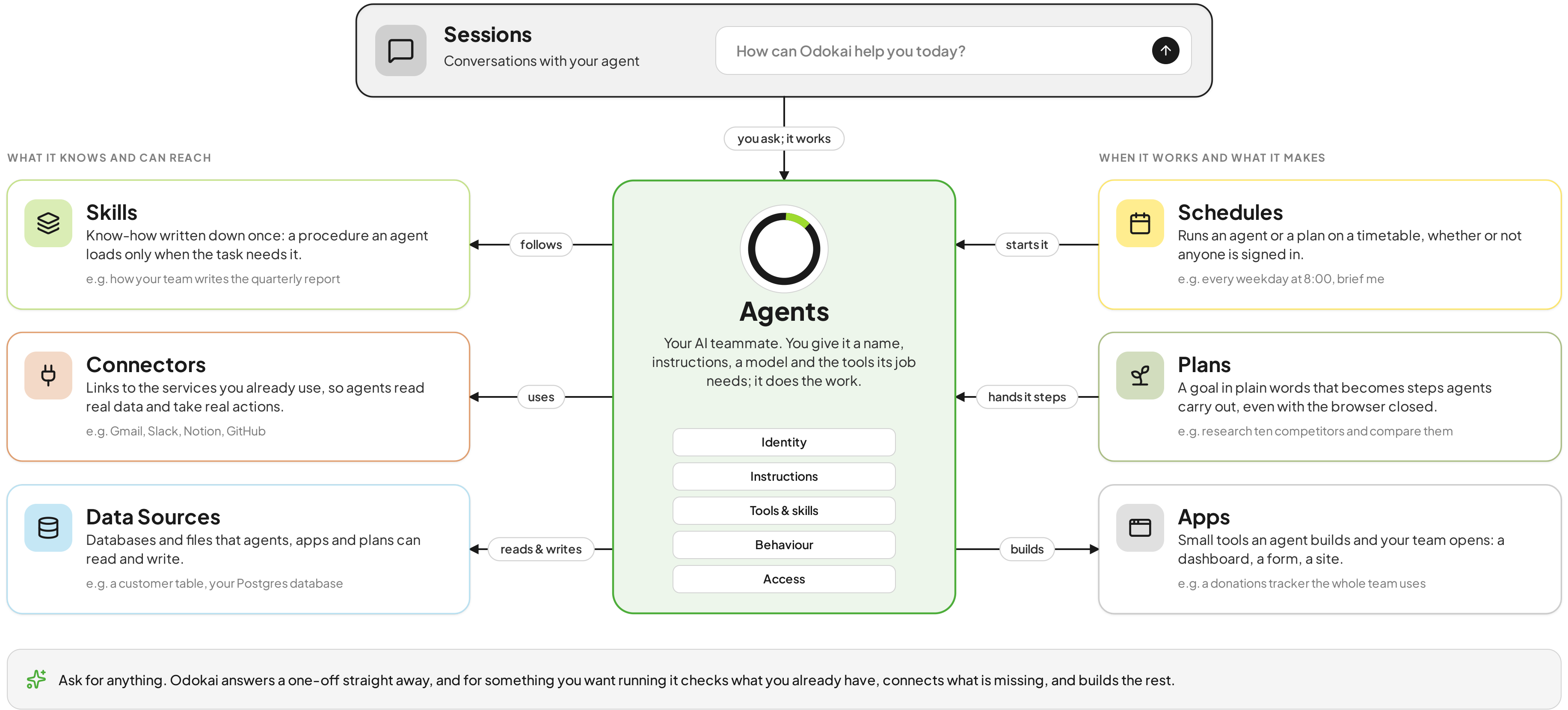
4



Get started

Your first week, one step a day

Page 19



Review the supplier contract
with Contract reviewer

4

Share

1 Read this contract and list what we have agreed to.

2 Reading supplier-agreement.pdf

Twelve commitments, three with deadlines. They are in commitments.md.

Draft a note to the team about the three deadlines.

Done: it is in team-note.md, ready for you to send.

Files in this session3

commitments.md
Written by the agent

team-note.md
Written by the agent

2 files changed

IN ONE SENTENCE

A conversation with your agent. Most of the time, it is all you need.

THINK OF IT AS

A thread with a colleague, with the notes and files kept together

HOW IT WORKS

1 Ask

New session, or Chat on any agent's page

2 It works where you can see it

Add files; answer its questions; watch each step

3 The work stays with the session

Files in this session, and every change, revertable

4 Bring people in

Share: they Can follow along or Can take the keyboard

MAKE ONE

IN THE APP

New session

OR JUST ASK

Read this contract and list what we have agreed to.

WORKS WITH

Agents

the one you talk to

Skills

Learn a skill from this

Schedules

each run opens a new session

Apps

Studio builds each app in one

GET THE BEST OUT OF IT

Most days, start a session with an agent you already have

Make a new agent only for a job that keeps coming back

Fork this conversation to get a second opinion from another agent

When one goes well, Learn a skill from this

Sessions

Agents

Skills

Connectors

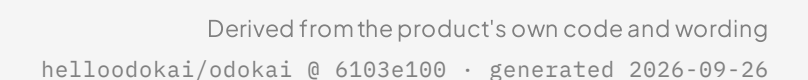
DataSources

Schedules

Plans

Apps

Derived from the product's own code and wording
helloodokai/odokai @ 6103e100 · generated 2026-09-26



📄 weekly-brief / SKILL.md

Name

weekly-brief

Description

Write the Monday pipeline brief in our format. Use when asked for the weekly brief.

Agents read this to choose the right skill — be specific.

Allowed tools

gmail_search_messages

Instructions

1. List the deals that moved stage
2. Pull the replies from prospects
3. Write three short sections

🔗 Shared with 3 teammates

WHAT THE AGENT SEES

expense-policy
What we will and will not reimburse.

board-pack
The monthly board pack, in the board's order.

weekly-brief
Write the Monday pipeline brief in our format.

→ Applying skill

OR RUN IT YOURSELF

/weekly-brief The Monday pipeline brief

/weekly-brief

→

IN ONE SENTENCE

A playbook written once, that any of your agents can follow when a task calls for it.

📖

THINK OF IT AS

The team's recipe card, handed to whoever is cooking

HOW IT WORKS

1 Write it once

A name, a description and the steps

2 Agents read only the description

The whole skill loads when a task matches it

3 Or run it yourself

Type / and its name in any conversation

4 Share it with your team

They can use it; only you can edit it

📝 MAKE ONE

IN THE APP

Skills

>

New Skill

OR JUST ASK

Turn what we just did into a skill called weekly-brief.

🔗 WORKS WITH

👤 Agents

follow it when a task matches

🔌 Connectors

the services its steps can use

📅 Schedules

a scheduled run can follow it

📱 Apps

an app can become a skill

💡 GET THE BEST OUT OF IT

✓ Say what it does and when to use it in the description

✓ Name it after the task: weekly-brief

✓ Did something well once? Press Learn from this

Sessions

Agents

Skills

Connectors

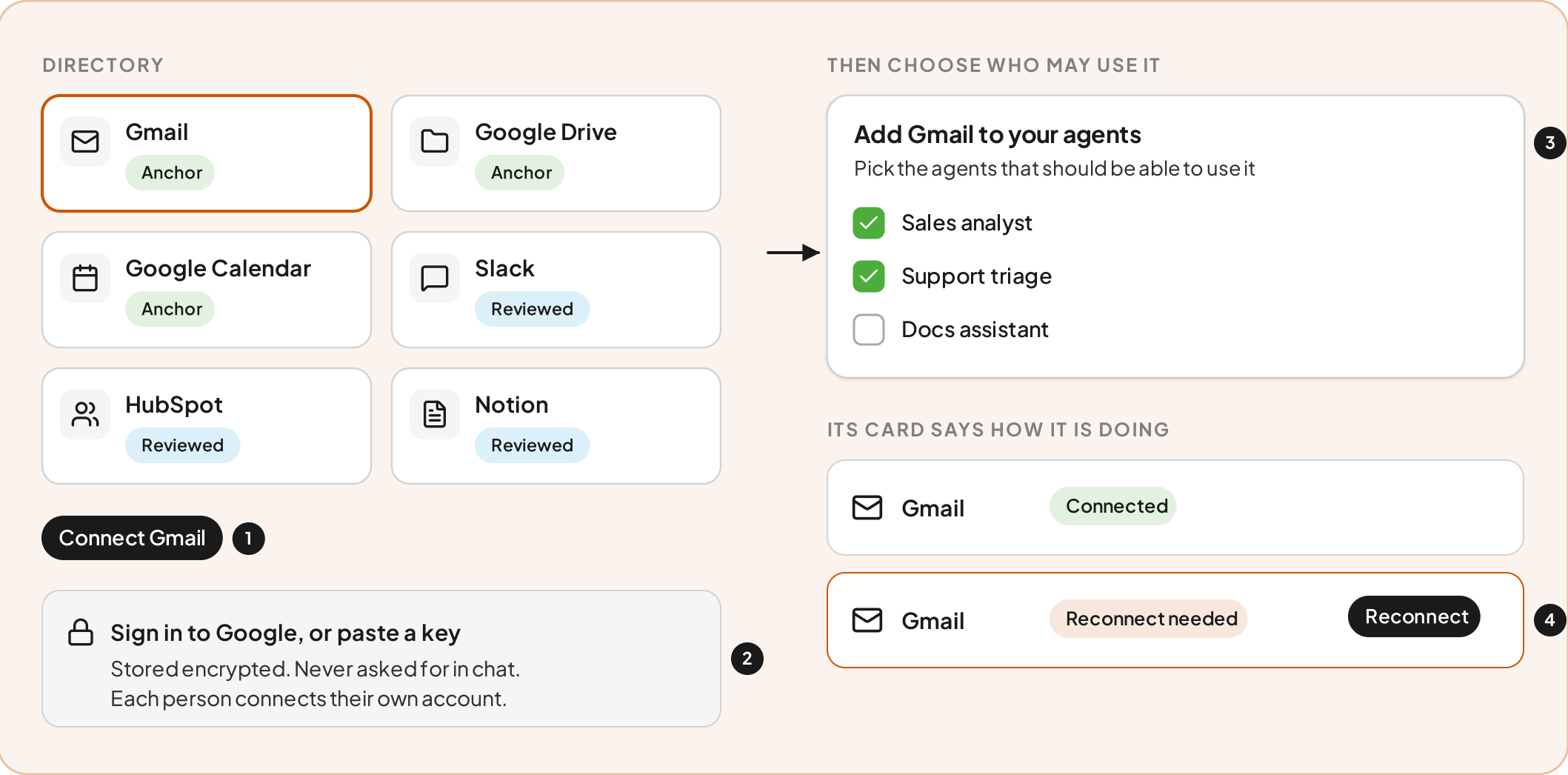
DataSources

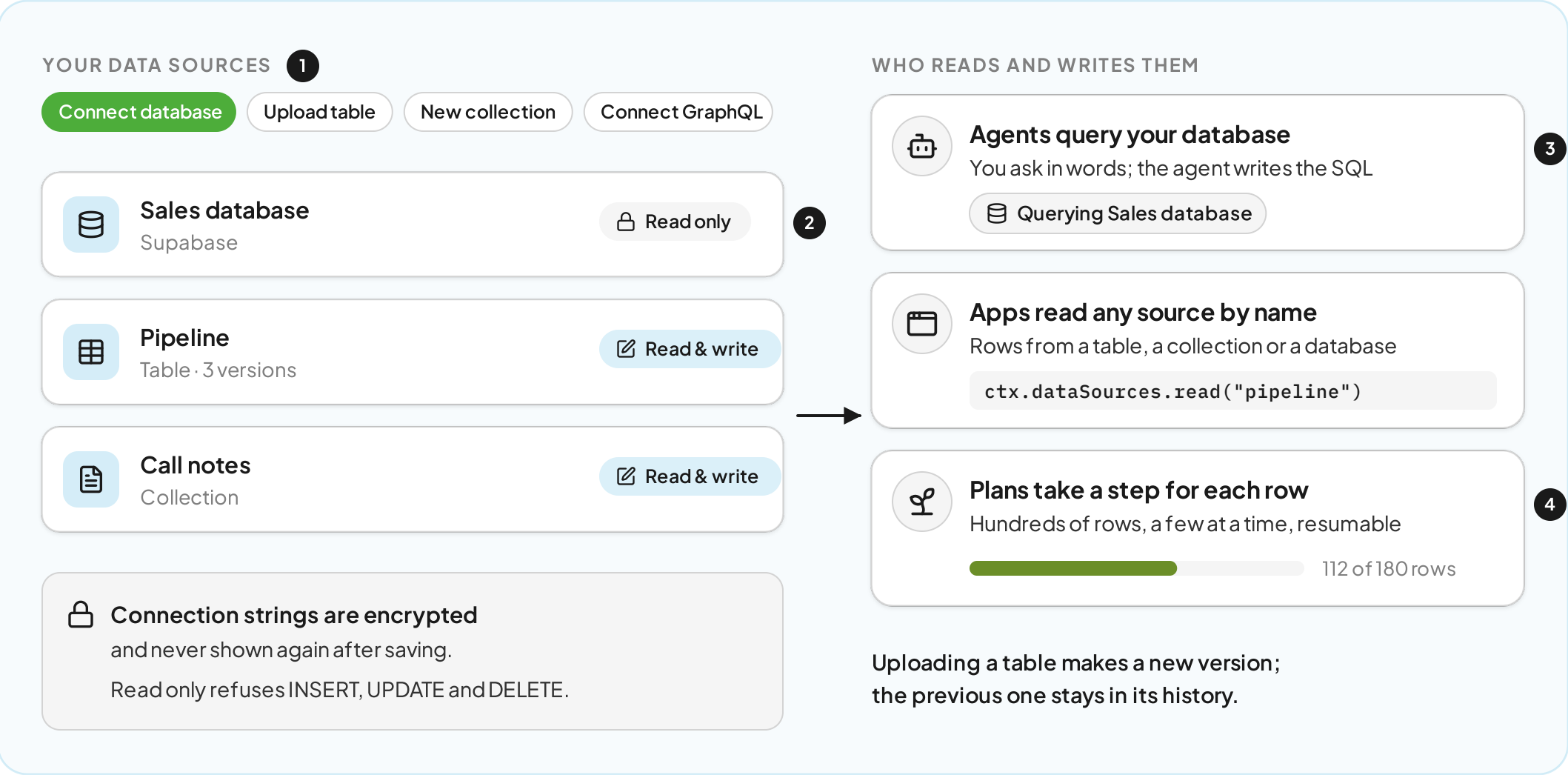
Schedules

Plans

Apps

Derived from the product's own code and wording
helloodokai/odokai @ 6103e100 · generated 2026-09-26





Create New Schedule

Schedule Name

Monday pipeline brief

Prompt

Write the pipeline brief for the sales team and list anything that needs a decision.

Schedule

every Monday at 8am

Plain words, or cron

Timezone

Europe/London

Create Schedule

EVERY MONDAY AT 8:00

Mon 08:00

→

Scheduled: Monday pipeline brief

Mon 08:00

→

Scheduled: Monday pipeline brief

Mon 08:00

→

Scheduled: Monday pipeline brief

WHERE THE RESULTS LAND

Notifications

Schedules

Monday pipeline brief

Three deals need a decision this week

Open

An email too, when a run has something to show

IN ONE SENTENCE

A timetable that wakes an agent with your instructions, even when you are away.

THINK OF IT AS

An alarm clock with a note for whoever it wakes

HOW IT WORKS

- Open an agent's Schedules tab
Give the schedule a name
- Say what to do, and when
Plain words like every Monday at 8am, or cron
- Each run starts a fresh conversation
No browser needed; it runs as you
- The results come to you
In the tray's Schedules tab, and by email

MAKE ONE

IN THE APP

Your agent

>

Schedules

>

Create Schedule

OR JUST ASK

Every weekday at 8am, brief me on overnight support tickets.

WORKS WITH

Agents

each run is one of them at work

Plans

a plan can run on one too

Skills

followed on every run

Connectors

fetch what is new each time

GET THE BEST OUT OF IT

Write the prompt so it stands alone: each run starts fresh

Set the timezone; it starts at UTC

Try it straight away with Execute now

Sessions

Agents

Skills

Connectors

DataSources

Schedules

Plans

Apps

Derived from the product's own code and wording
helloodokai/odokai @ 6103e100 · generated 2026-09-26

Plan Assistant

Hi. What would you like to accomplish?

1

Compare our ten biggest competitors' pricing in one table.

Which markets should it cover, and in which currency?

The UK and the US, in pounds.

Here is the plan. Check it, then press Execute.

Execution Plan

Run pre-flight check

Execute

2

Competitor list

input

Research their pricing

for each of 10 · Research analyst

Compare the prices

think

Write the report

Writer agent

3

report.md exists, not empty

acceptance check

retry / replan

Running · step 2 of 5 · you can close the browser

4

IN ONE SENTENCE

A goal in plain words, turned into steps your agents carry out and check.

THINK OF IT AS
A project plan that carries itself out

HOW IT WORKS

- 1

Describe the outcome
The Plan Assistant asks a few questions
- 2

Check the steps, then Execute
Run the pre-flight check first
- 3

Every result is checked
A failed step retries, or the plan adjusts
- 4

Close the browser; come back later
Progress is saved, and it resumes

MAKE ONE

IN THE APP

Plans

New Plan

OR JUST ASK

Compare our ten biggest competitors' pricing in one table.

WORKS WITH

Agents

carry out its steps

Data Sources

a step for each row

Schedules

run it on a timetable

Connectors

tools its steps can use

GET THE BEST OUT OF IT

✓ Say what done looks like: a file, a table, a length

✓ Run the pre-flight check before you Execute

✓ Interrupted? Execute again picks up where it stopped

Studio

What would you like to build?

1

Build me a project tracker where my team can log tasks, set deadlines, and mark progress.

2

Writing the app's files

Rebuilt after every save

It is in the preview. Shall I add due-date reminders?

Fix this

Version history

Share

4

Project tracker

This week

Add task

Task	Owner	Due	Status
Draft the proposal	Sam	Fri	In progress
Book the venue	Ana	Mon	Done
Send the invites	Lee	Tue	To do

WHO CAN OPEN IT

☐ Only the people named here

☒ Anyone signed in to Odokai

☐ Anyone on the web

can add a passcode

3

IN ONE SENTENCE

A small tool an agent builds for you, that you and your team open and use.

THINK OF IT AS

A tool made to measure while you describe it

- HOW IT WORKS
- 1

Describe it in Studio

Or start from one of the suggestions
- 2

An agent builds it

Every save rebuilds it straight away
- 3

Try it in the preview

Ask for changes, or press Fix this
- 4

Share it or publish it

Named people, anyone signed in, or anyone

MAKE ONE

IN THE APP

Apps

New App

OR JUST ASK

Build a page where customers book a demo, and show us the list.

WORKS WITH

Agents

it can ask one for help

Data Sources

reads and writes them by name

Connectors

calls the services you connected

Skills

it can become one for agents

GET THE BEST OUT OF IT

One app per Studio conversation: start a new one for the next

For team tools, choose Anyone signed in to Odokai

It runs with your access: publish it on purpose

I WANT

Something done right now

Sessions

Start a session with the Odokai Assistant, or an agent you already have

I WANT

A specialist for a job that keeps coming back

Agents

Make it once; then start sessions with it

I WANT

A task done our way, every time

Skills

Write the steps once; agents follow them

I WANT

Agents working in our email, chat or CRM

Connectors

Sign in once, then pick the agents

I WANT

Answers from our own figures

Data Sources

Connect your database; agents query it

I WANT

A brief every morning, without asking

Schedules

Pick the agent, the words and the time

I WANT

To hand over a big goal and come back later

Plans

Describe the outcome; agents do the steps

I WANT

A tool my team can open and use

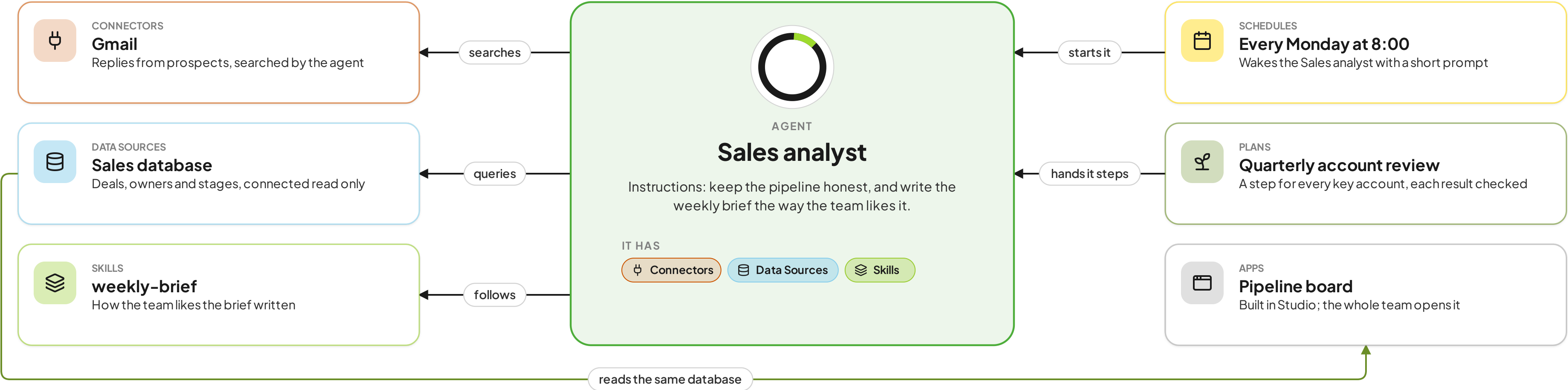
Apps

An agent builds it; you publish it

✦ Not sure? Describe the problem on the dashboard. Odokai checks what you already have, connects what is missing, and builds the rest.

Sessions Agents Skills Connectors DataSources Schedules Plans Apps

Derived from the product's own code and wording
helloodokai/odokai @ 6103e100 · generated 2026-09-26



AGENTS TAKE ON

 **Gathering**
The inbox, the database, the web

 **Drafting**
Proposals, commentary, client reports

 **Checking**
Invoices checked, contracts read for risk

 **Chasing**
Renewals, follow-ups, what is due

 **Watching**
On a timetable, day and night

YOUR PEOPLE KEEP

 **Judgement**
What matters, and what to say

 **Relationships**
The client, the call, the room

 **The yes**
Approvals where a person decides

 **The standard**
How the work is done, written once

 **Exceptions**
The cases no rule foresaw

ONE JOB FOR EVERY PART OF THE FIRM, EACH DRAWN END TO END IN ODOKAI AT WORK

 **Professional services**
Drafts proposals from call notes
Pack

 **Insurance broking**
Assembles the week's renewal packs
Pack

 **Support**
Triage tickets and drafts replies
Template

 **Legal**
Reads contracts for risk
Template

 **Sales**
Scores leads, writes talking points
Template

 **Accountancy**
Drafts the monthly commentary
Pack

 **Client service**
Writes the Friday client update
Pack

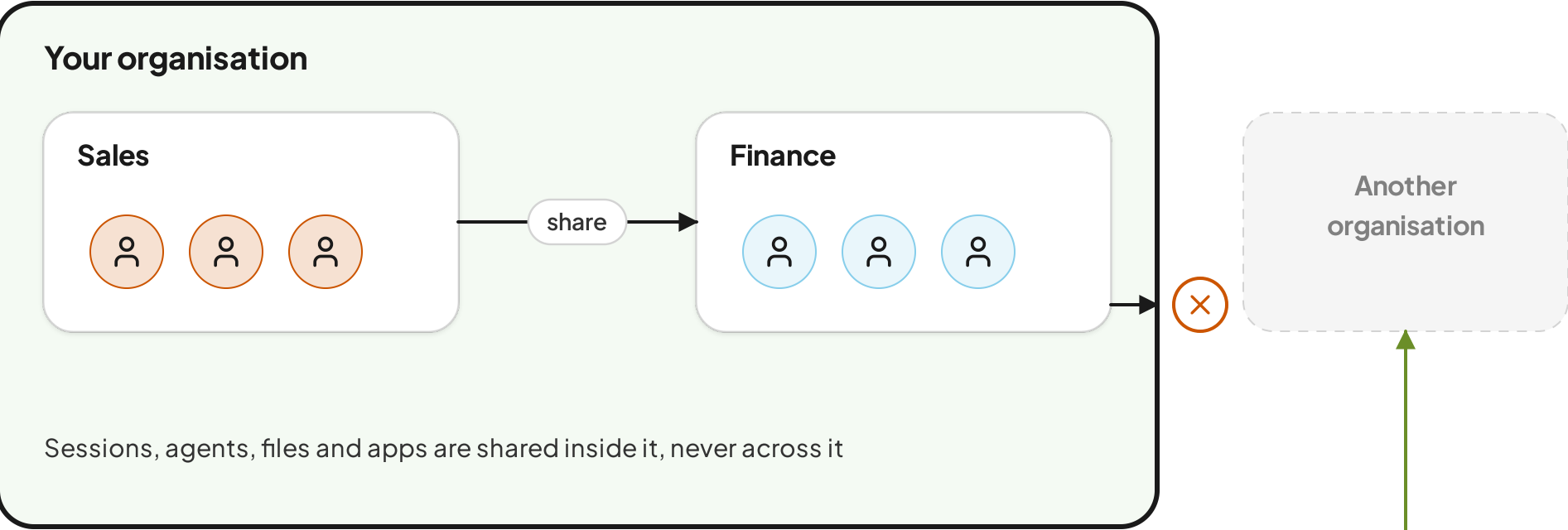
 **Finance operations**
Checks that invoices add up
Template

 **Operations**
Checks the numbers, alerts Slack
Template

 **Strategy**
Tracks competitors every week
Template



YOUR ORGANISATION IS THE FENCE



THE ONE SHARE THAT CAN LEAVE

Anyone with the link Made by the owner, with an optional passcode

ROLES DECIDE WHAT EACH PERSON CAN DO INSIDE

Each adds to the one before

Everyone
Works with agents in sessions; shares inside the organisation

Builder
Makes agents, skills, tools and apps

Operator
Reads the model ledger, runs agent checks

Org Admin
People, roles, teams and API tokens

→] SIGN IN YOUR WAY

Email and password

Continue with Google

Continue with Microsoft

Continue with GitHub

🔑 TWO-FACTOR AUTHENTICATION

482913

Each person can add an authenticator app, with recovery codes for a lost phone

<> TOKENS FOR SCRIPTS

🔑 odokai_.....

Personal access tokens for programmatic API access.

Expire in 7, 30 or 90 days, or never

AN AGENT WANTS TO ACT



Sales analyst
Writing the Monday note

It is about to

📧 gmail_send

THE RULES DECIDE



Your approval mode
Auto Ask Require permission starts on Auto



An admin's rules for a role
They beat a person's own mode and list



A skill's own gate
Named people approve one action

A PERSON DECIDES

allow



Approval needed to run gmail_send
Approve once Deny

deny



It runs



It stops



WHERE APPROVALS WAIT

Queue Myrules Governance



gmail_send
Sales analyst, for you

Deny Approve once

Tool calls waiting on a decision. Approving adds the tool to that user's allow list so it won't ask again.



LONG JOBS PAUSE



Step 1



Step 2



Step 3 waits



Step 4

A plan stops at the step that needs a yes, and carries on once someone approves.



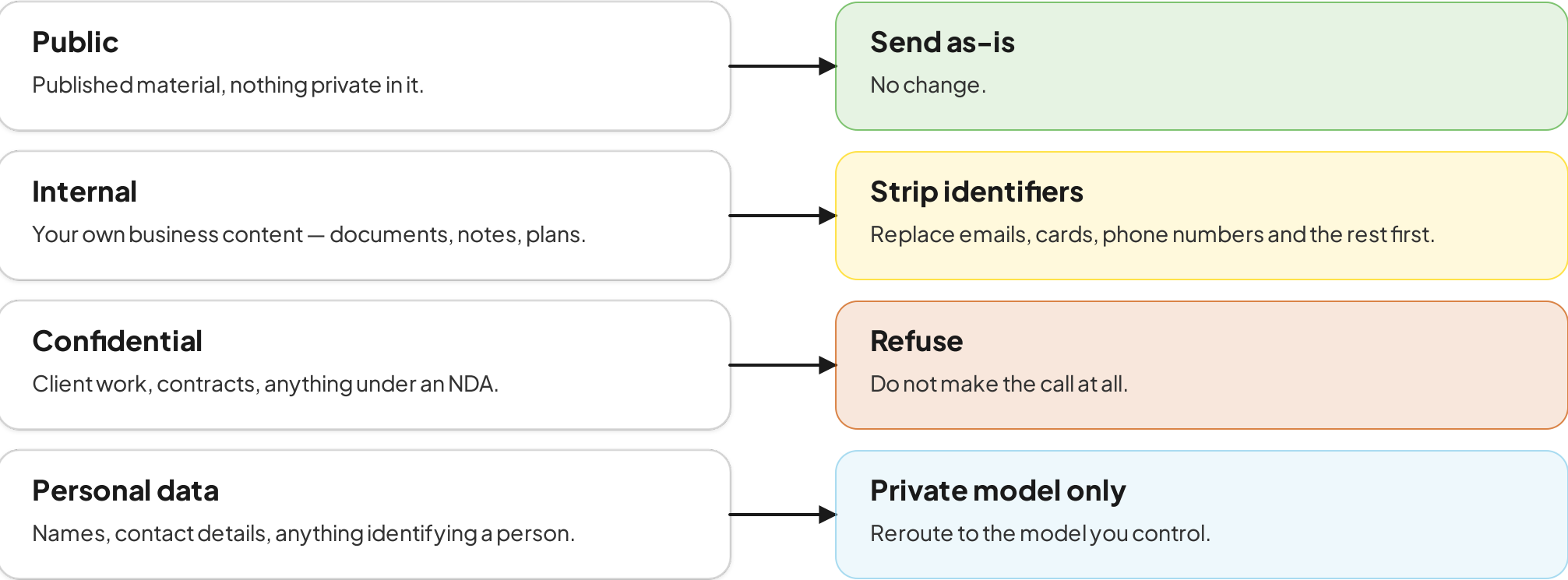
AGENTS NEVER APPROVE



No agent has a tool that can decide an approval.
Only a person can.

WHEN DATA REACHES A MODEL THAT IS NOT APPROVED FOR IT

Every kind of data gets one rule, and an administrator chooses it



IDENTIFIERS SWAPPED OUT, THEN PUT BACK

YOUWRITE

Email jane@example.com and call her on 020 7946 0000

THE MODEL SEES

Email [REDACTED:email:A7F3] and call her on [REDACTED:phone:4C1E]

YOUREAD

Done: the email to jane@example.com is drafted for you

Values are replaced before the model sees them and put back in anything the model sends onward, so tools still receive the real values.

Email addresses

Phone numbers

Payment card numbers

UK passport numbers

and 12 more kinds

 A MODEL YOU RUN



Point Odokai at a model inside your own network, and personal or confidential data goes there instead of to a provider.

 TEMPORARY CONVERSATION



Temporary conversation. It will not be saved to your workspace or listed, and the agent can only read your data — not write, send or store anything.

 CLEAN UP A CONVERSATION



Remove what a conversation left behind, its messages, files and uploads, after seeing the full list. Audit and billing records stay.

GOVERNANCE

Who	Model	Rule	Stripped
Sam	Default model	Strip identifiers	2 identifiers
Priya	Private model	Private model only	none
Alex	Default model	Send as-is	none

CSV

Signed compliance bundle

Shared Responsibility Matrix (PDF)

Who called which model, the rule that matched and what was stripped, exported signed for an auditor

AUDIT LOG

Priya changed the Sales analyst's instructions

09:12

Alex invited Sam to a conversation

10:40

Sam's agent shared a folder with Finance

11:05

Who did what, kept for seven years; a change an agent made is marked as the agent's

EXECUTION HISTORY

Monday briefCompleted

Quarterly account reviewCompleted

Renewals runFailed

View all plan and schedule executions

CHECK YOUR AGENT BEFORE YOU SHARE IT

✓

It asks before doing something it cannot undo

✓

It never uses a particular tool

✗

It looks something up before it acts

A check talks to your agent and watches what it actually does: which tools it reaches for, and whether it asks first

CONNECTORS

- Connected
- Reconnect needed
- New credentials needed
- Can't reach it

Each connector says when an agent can no longer reach its service, and what fixes it

CREDITS & BILLING



How your credits are being spent over time.

EVERY LAYER IS YOURS TO CHOOSE

 Your people

Roles you assign

 Your organisation and teams

 Two-factor sign-in

 Your agents

Instructions you write

 Skills as plain SKILL.md files

 Every change versioned

 Your tools

The connector directory

 MCP servers you add

 Webhooks and the API

 Your models

The providers you approve

 A model for each job

 Private models in your network

 Your data

Your own database

 Your files

 Your audit trail

 Your cloud

Your AWS account

 Your encryption keys

 Monitoring where you say

NO LOCK-IN

 Use it from your other AI tools

Odokai is itself an MCP server: tools that speak MCP connect with an API token

 Skills are portable

The same SKILL.md format Claude Code reads; export any skill as a zip

 Apps are yours

Upload or download an app as a .zip; its files live in your workspace

 Code goes where you keep code

Clone, commit and push to your own repositories

RUN IT WHERE YOUR RISK APPETITE SAYS

 Hosted by Odokai

Nothing to run; your organisation fenced from every other

→

 In your AWS account

Same product; your VPC, database and keys

→

 Models inside your network

Personal and confidential data goes to the model you run

DAY 1

Ask

DO THIS

Press New session and ask the Odokai Assistant for something real.

Sessions

TRY SAYING

“Read this contract and list what we have agreed to.”

FIND IT

New session

DAY 2

Connect

DO THIS

Connect the service your work lives in, and give it to your agent.

Connectors

TRY SAYING

“What is in my calendar this week that needs preparing?”

FIND IT

Connectors > Directory

DAY 3

Bring your data

DO THIS

Connect your database so agents can query it for you.

Data Sources

TRY SAYING

“Which customers have not ordered in ninety days?”

FIND IT

Data Sources > Connect database

DAY 4

Make a specialist

DO THIS

Give a repeated job its own agent, and its steps a skill.

AgentsSkills

TRY SAYING

“Turn what we just did into a skill called weekly-brief.”

FIND IT

Command Palette > New Agent

DAY 5

Let it run

DO THIS

Put it on a schedule, hand it a plan, or give the team an app.

SchedulesPlansApps

TRY SAYING

“Every Monday at 8, send me the pipeline brief.”

FIND IT

Your agent > Schedules

SHORTCUTS WORTH KNOWING

Packs

Ready-made agents, skills and schedules for one problem

>_

Command Palette

Every “New ...” in one place: Ctrl K, or Cmd K on a Mac

?

Help

Ask how to do anything; answered from the live docs