



OWNER BUSINESS DRAFT • LEGAL REVIEW PENDING • NOT FOR SIGNATURE

EZKALL AI CUSTOMER AGREEMENT PACK

Service Activation Schedule

The exact approved configuration, evidence, owners, gates, and rollback path for a customer launch.

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REVISION DATE	October 14, 2026
SERVICE PROVIDER	EZ2 Fund Solutions LLC, operating the EZKall AI service

Review boundary. This editable document records EZKall AI's current owner-approved business terms and operational controls. It has not completed qualified legal review and must not be signed, sent as a final agreement, or used to activate service until its status is changed in a separately approved release.

1 Customer and activation identity

Customer legal name	[Exact legal name]
Public business name	[Customer-facing brand]
Order Form reference	[EZKall Order Form ID and effective date]
Tenant / organization ID	[System-generated identifier]
Activation record ID	[System-generated or governed decision ID]
Operational owner	[Name, title, email, telephone]
Independent backup	[Name, title, email, telephone]
Current state	☐ Draft ☐ Held ☐ Pilot ☐ Active ☐ Suspended ☐ Retired
Activation window	[Date, time, time zone, maximum duration]

2 Business profile and service boundary

Industry / service type	[Enter business type]
Service locations	[Locations, regions, or national boundary]
Primary time zone	[Example: America/Phoenix]
Operating hours	[24/7/365 or exact schedule]
After-hours behavior	[Record intake / alert operator / closed message / other]
Emergency statement	[Exact 911 or emergency-language requirement]
Sensitive-data boundary	[Exact prohibited-data categories and redirect behavior]
Supported languages	[English / Spanish / other accepted languages]

3 Channel and number configuration

Channel	Number / address	Ownership / purpose	State
Inbound voice	[E.164 number]	[Customer-owned / Provider-managed / forwarded / ported]	[Held / Pilot / Active]
Inbound SMS	[E.164 number]	[Registered use case and sender]	[Held / Pilot / Active]
Published customer care	[Public number]	[Live assistance or published support]	[Held / Active]
Operator alert sender	[Sender or Messaging Service]	[PII-free internal alerts]	[Held / Active]
Customer email	[Approved sending identity]	[Transactional purpose only]	[Held / Active]

Voice webhook / route	[Approved function or route name; no credentials]
Messaging webhook / route	[Approved function or route name; no credentials]
Status callback route	[Approved minimized callback route]
Provider account owner	[Legal account owner and authorized operator]
Registration evidence	[Toll-free verification / A2P / other applicable record]

4 Routing and escalation map

Selection / trigger	Destination	Primary owner	Fallback
1 — [Division / service]	[Queue or workflow]	[Name / role]	[Safe message / alternate queue]
2 — [Division / service]	[Queue or workflow]	[Name / role]	[Safe message / alternate queue]
3 — [Division / service]	[Queue or workflow]	[Name / role]	[Safe message / alternate queue]
0 — General help	[General queue]	[Name / role]	[Published customer-care number]
No valid entry	[Safe hang-up / retry limit]	[System]	[Published assistance path]
Emergency phrase	[911 safety path]	[System]	[No service intake]
Human request	[Specialist queue]	[Operator]	[No promise / callback held unless active]

Elapsed time	Recipient	Message boundary	Stop condition
5 minutes	[Primary operator]	PII-free unclaimed-intake alert	Claimed, closed, held, or removed
15 minutes	[Independent backup]	PII-free backup alert	Claimed, closed, held, or removed
30 minutes	[Primary + backup]	PII-free joint escalation	Claimed, closed, held, or removed

5 Voice experience

AI / assistant nickname	[Customer-approved character nickname]
Opening identification	[Exact company, service, automation, and operator disclosure]
Initial pause	[Approved seconds before speech begins]
Voice profile	[Approved voice, pacing, tone, accent, and pronunciation notes]
Intake questions	[Exact approved sequence or governed prompt reference]
Knowledge boundary	[Approved sources; unsupported topics must escalate or decline]
Human handoff	[Held / transfer route / callback route / operating hours]
Recording	☐ Held ☐ Active with approved notice, consent, storage, and retention
Transcription	☐ Held ☐ Active with approved notice, access, retention, and deletion
Generated AI	☐ Held ☐ Active within approved prompt, disclosure, eval, and fallback

6 SMS experience

Program / use case	[Customer-care, conversational intake, scheduling, or other approved use]
Opening identification	[Exact brand and automated-assistant disclosure]
Menu / first prompt	[Exact options with numbered dash format where applicable]
HELP response	[Exact approved support response and published customer-care route]
STOP response	[Exact opt-out confirmation]
START response	[Exact resubscribe confirmation]
Message frequency	[Expected frequency and disclosure]
Consent source	[Website checkbox / inbound initiation / verbal / written / other]
Session timeout	[Duration and safe restart behavior]
Generated AI	☐ Held ☐ Active within approved prompt, consent, eval, and fallback

7 Data, workspace, and retention

Data class	Permitted content	Retention / redaction	Access
Alert	Reference only; no customer PII	Operational log policy	Consented operators
Intake queue	Minimized service, city, channel, timestamps	[Approved days / redaction event]	Authorized organization roles
Contact reveal	Telephone/email only after authenticated claim	Audited access record	Authorized claimed operator
Conversation session	Temporary state needed for the approved flow	[Timeout / purge window]	Runtime service only
Provider receipt	Minimized IDs, status, error codes	[Approved retention]	Operations / audit roles

Workspace roles	[Owner / administrator / operator / reviewer / backup]
Invitation owner	[Authorized person who releases the customer invitation]
Contact reveal audit	[Required event, reason, and reviewer]
Export / deletion	[Approved request and verification path]

8 Acceptance evidence

Test	Expected result	Evidence / date	Result
Authorized workspace access	Correct customer scope; no cross-tenant access	[Reference]	☐ Pass ☐ Fail
Unauthorized access	Denied; no information disclosed	[Reference]	☐ Pass ☐ Fail
Voice happy path	Disclosure, intake, queue item, safe close	[Reference]	☐ Pass ☐ Fail
Voice no-input / invalid	Bounded retry and safe close	[Reference]	☐ Pass ☐ Fail
SMS happy path	Consent-aware intake and completion	[Reference]	☐ Pass ☐ Fail
HELP / STOP / START	Exact approved deterministic responses	[Reference]	☐ Pass ☐ Fail
Operator alert	5/15/30-minute routing, PII-free, stops on claim	[Reference]	☐ Pass ☐ Fail
Claim and contact reveal	Authenticated, audited, correct contact	[Reference]	☐ Pass ☐ Fail
Failure callback	Signed minimized exception; no retry expansion	[Reference]	☐ Pass ☐ Fail
Rollback	All affected gates return to Held and remain held	[Reference]	☐ Pass ☐ Fail

9 Activation and rollback controls

Pre-activation commit	[Exact release / commit / deployment identifier]
Approved configuration	[Exact environment and provider settings, excluding secret values]
Go / no-go owner	[Named human authority]
Rollback owner	[Named independent operator]
Automatic stop triggers	[First material failure, unauthorized access, wrong route, missing disclosure, unexpected contact, other]
Rollback action	[Return named gates to Held, restore prior release/configuration, verify routes]
Post-activation monitoring	[Owner, duration, signals, incident route]
Evidence location	[Repository record, operations event, or other authoritative reference]

Fail-closed rule: missing approval, configuration, signature, consent, evidence, or safety control keeps the affected capability Held. Unrelated accepted capabilities remain unchanged unless the incident requires a broader hold.

10 Activation authorization

Capability	Approved state	Approval reference	Effective time
Deterministic voice intake	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Conversational voice AI	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Deterministic SMS intake	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Conversational SMS AI	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Operator alerts	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Transfer	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Callback	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]
Recording / transcription	[Held / Pilot / Active]	[Decision ID]	[Timestamp / time zone]

Customer confirms the business profile, scripts, destinations, hours, disclosures, and permitted data above are accurate.
 Provider confirms the accepted configuration is the only configuration authorized for activation.

EZ2 FUND SOLUTIONS LLC	CUSTOMER
Authorized signature: _____	Authorized signature: _____
Printed name: _____	Printed name: _____
Title: _____	Title: _____
Date: _____	Date: _____

ACTIVATION OWNER	INDEPENDENT ROLLBACK OWNER
Authorized signature: _____	Authorized signature: _____
Printed name: _____	Printed name: _____
Title: _____	Title: _____
Date: _____	Date: _____