Quick Setup Guide

From first launch to your first useful conversation.

A companion to the in-app setup walkthrough. Start with one AI connection, keep the defaults where they suit you, and add optional services when you need them.

Your shortest route: Launch JARVIS, connect a brain, try a reply, and open chat. A vault lets you add business profiles, saved notes and tasks. Voice and other connections can wait.



The Assistant screen after setup: conversation controls, your avatar and reminders, separate To-Dos and Assistant Work, and a selectable status area along the bottom.

Have these ready

A Windows PC with internet access, your JARVIS download, and an API key from the AI provider you choose. A microphone and speakers are optional. An API key is a private access code; paste it only into the provider connection screen.

AI usage is charged by your provider separately from JARVIS. A paid Claude or ChatGPT chat subscription may not include API credit. Check the provider account for billing or available credit before testing.

Install or launch your supplied download

1. Download the Windows installer from your Payhip purchase email or download page. Keep your checkout email address and license key handy.

2. Close JARVIS if it is running. Open the supplied Setup.exe installer. The installer chooses its application folder; your vault is chosen separately during setup.

JARVIS opens with a short branded loading screen. It uses your saved assistant name when available and shows the startup stage while the main window is prepared. On a first installation it uses the default name until you personalize the assistant.

Install safely and activate

If Windows says it protected your PC

Windows Defender SmartScreen may show **Windows protected your PC** because a new independently published app has not yet built enough download reputation. This warning does not by itself mean the file contains malware. Every My Digital Jarvis release installer is checked with current antivirus software before publication, but no security scan can guarantee that every file is risk-free.

1. Continue only if you downloaded the installer through your official Payhip purchase email or download page. Do not use a copy sent by an unknown person or posted on another site.

2. On the blue warning, choose **More info**. Confirm that the app is the My Digital Jarvis Setup.exe you just downloaded. The early independent release may show **Unknown publisher**.

3. Choose **Run anyway** to continue installation. If Windows does not offer Run anyway, a PC security policy or Smart App Control may be blocking unsigned apps. Do not turn off security protection; contact your administrator or **support@mydigitaljarvis.com**.

SmartScreen checks app and publisher reputation. A newly released unsigned version can show this warning even after an earlier version installed normally. Later upgrades may open without the same warning on a PC that already recognizes the app.

Microsoft SmartScreen explanation

https://learn.microsoft.com/en-us/windows/apps/package-and-deploy/smartscreen-reputation

Activate your license

1. Launch My Digital Jarvis from Windows Start. At the license screen, enter the email used for the Payhip purchase and its license key, then choose **Activate this PC**. Internet access is required. Choose **Continue to setup**. Reopen the walkthrough later through **Menu > Setup > New-user walkthrough**.

QUICK SETUP / MOVE

Move JARVIS to another computer

Transfer the license, settings, connections and vault as one complete workflow.

COMPLETE MOVE CHECKLIST

1. Old PC: **Menu > Setup > Backup & restore**. Create an encrypted settings-and-connections backup, save its password, and copy the backup to the new PC.
2. Separately copy your vault and needed local source/output folders. The settings backup does not contain all work files.
3. Old PC: **Menu > Setup > License > Deactivate this computer**.
4. New PC: install JARVIS and activate with the same Payhip purchase email and key.
5. Restore the encrypted backup, choose the copied vault, restart, then test connections, scheduled tasks and local file paths.

Old PC unavailable? Email **support@mydigitaljarvis.com** to release its activation. Payhip provides the purchase and key; it does not manage PC activations.

Online checks and offline use: JARVIS checks the license no more than once a day when a check is due. After a successful verification, a PC can continue through a temporary licensing-service or internet outage for up to seven days. Your vault and settings remain yours if a check cannot be completed.

Updated October 16, 2026 for v0.8. Screens show representative setup states; your saved settings and connection status will differ.

JARVIS website

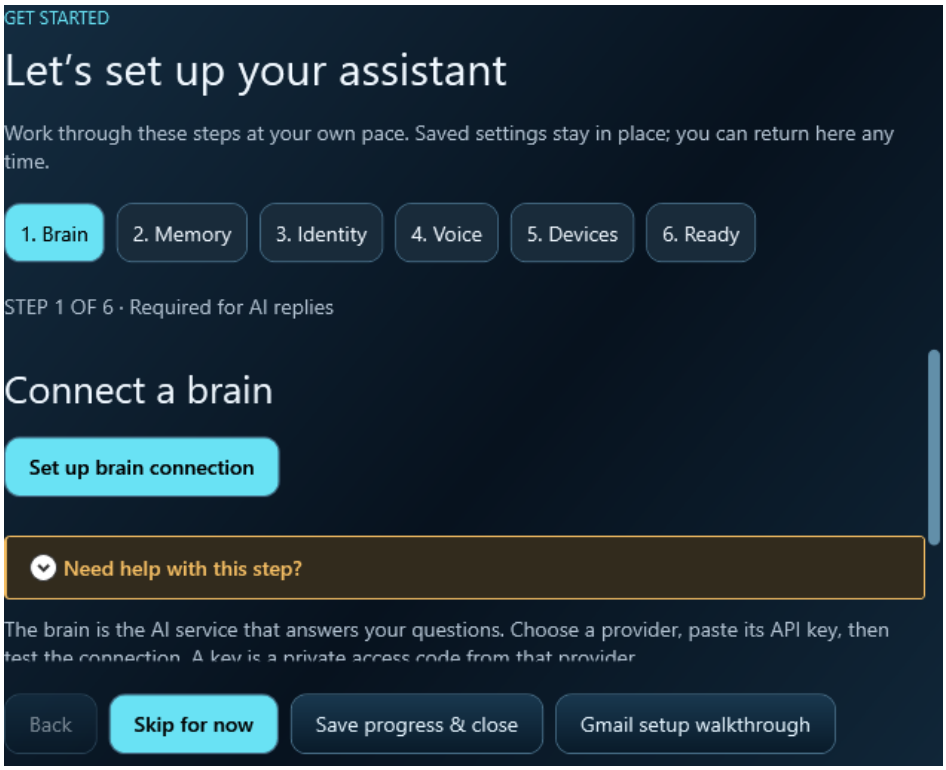
https://mydigitaljarvis.com

Inside: six setup steps, first-setup help and a custom-face bonus prompt.

QUICK SETUP / 01

Follow the six setup steps

The walkthrough is your home base. Each step opens the settings it needs, then returns you here.



Look for the amber Need help with this step? panel below the main action. It appears on every walkthrough step.

1. **Brain:** connect the AI that answers your requests.
2. **Memory:** choose your notes folder, or skip for typed chat.
3. **Identity:** choose a name, face and preferred tone.
4. **Voice:** choose how JARVIS speaks and listens.
5. **Devices:** check your microphone and speakers.
6. **Ready:** try a real reply and open chat.

Use **Back** or the numbered step buttons to revisit a step. **Save progress & close** lets you pause. Use each settings screen's Save button before returning; changing a field is not the same as saving it. Expand **Need help with this step?** for plain-language help, a support report, or an editable question for JARVIS after the brain works.

QUICK SETUP / 02

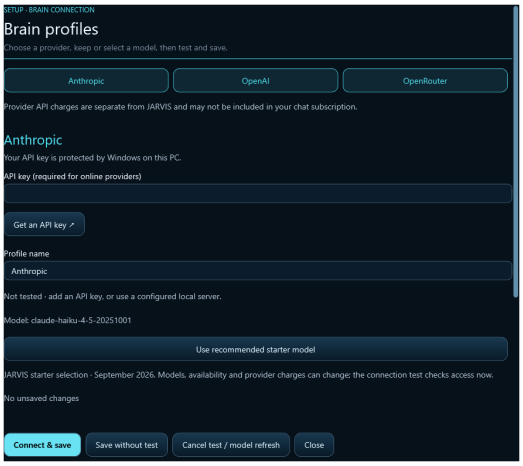
Connect your AI brain

In step 1, choose Set up brain connection. For this guide, use Anthropic or OpenAI and keep the starter model.

1. Select your provider. Choose **Get an API key** to open its official account site. Sign in, create a key, and check that API billing or credit is ready.

2. Paste the key into **API key**. Keep the profile name and recommended starter model, or give the profile a friendly name.

3. Choose **Connect & save**. The small test uses your provider account and includes no vault notes. On success, the screen closes and the walkthrough shows the saved connection status.



Brain connection screen. Keep Advanced settings closed for a standard provider.

Save without test stores a profile without confirming it works. If the test fails, your edits remain: check the key, provider billing and model access, then retry.

Claude and images: Claude can analyze attached images with a compatible vision model. Anthropic currently does not provide a raster-image generation or editing API, so creating an image needs a separate OpenAI profile or an approved image-capable MCP connection. Claude can remain your conversational brain; JARVIS will show this before an image request and will not silently switch providers.

Anthropic / Claude API account

https://platform.claude.com/

OpenAI API keys

https://platform.openai.com/api-keys

Choose your memory folder

A vault is a folder of notes. JARVIS uses it to learn about you and your businesses and to keep saved work organized.

A normal folder is all you need

1. In Windows File Explorer, create a folder you can find again, such as **Documents > My JARVIS Vault**. An empty folder is fine. Keep it outside the application installation folder.

2. In JARVIS, choose **Memory > Choose or check vault > Choose vault folder**. Select your folder. JARVIS creates its starter folders and keeps saved work there.

3. If you already have notes, select the folder containing them. An existing Obsidian vault also works: select its root folder, rather than .obsidian or an individual note.

Optional: organize notes with Obsidian

Obsidian is a free app for reading and editing your notes. It is recommended if you want a dedicated notes workspace, but it is not required by JARVIS. Optional Sync and Publish services cost extra. Open the same folder in Obsidian if you choose to use it.

4. After the connection completes, check the selected folder. If it contains notes, search for a familiar title and check the preview. Choose **Done**, then **Next step**.

Keep **Ask before saving notes to my vault** enabled to start. Relevant note excerpts may be sent to your selected AI when answering requests. Do not put API keys or passwords in your notes.

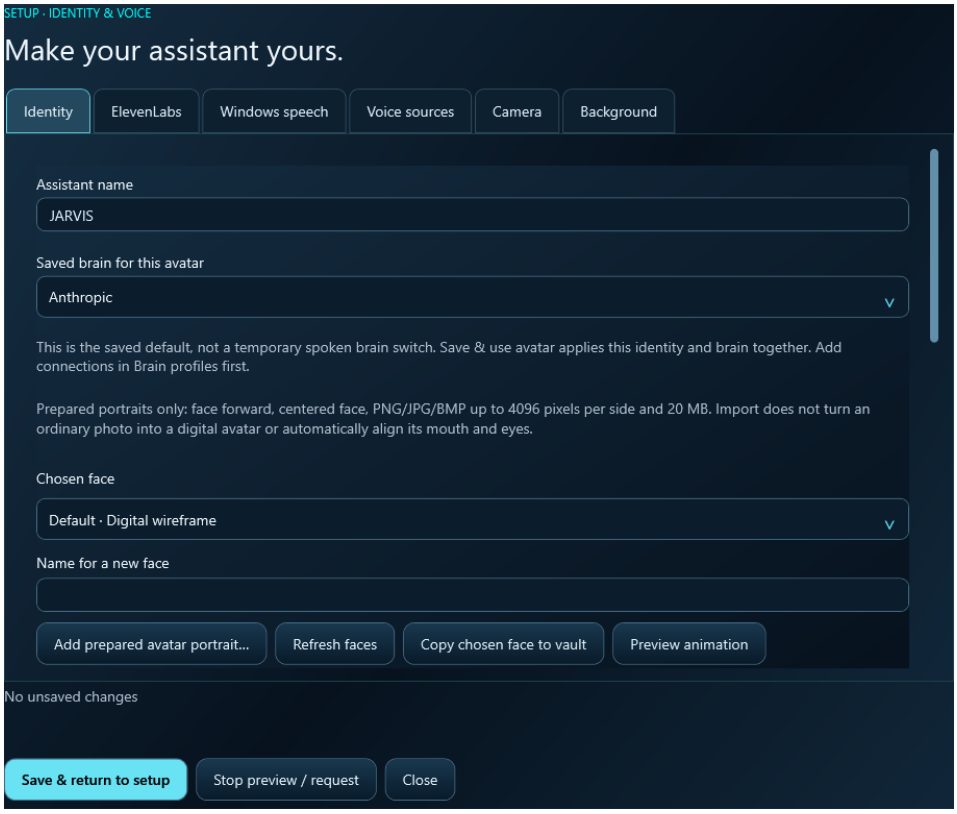
Download Obsidian
https://obsidian.md/download

Obsidian: create or open a vault
https://obsidian.md/help/vault

You can skip memory and begin chatting. Connect a vault before setting up business profiles and saved tasks.

Make your assistant yours

In Identity, choose Personalize your assistant. Keep the included face for your first test; you can add your own later.



Identity and face controls. Scroll for more options. Save & return to setup is at the bottom when opened from the walkthrough; the standalone screen uses Save & use avatar.

1. Set the **Assistant name** and choose its **Saved brain**. Use the connection you just tested.

2. Choose an included face from **Chosen face**. Use **Preview animation** to check its appearance.

3. Scroll to set how the assistant addresses you and the tone you prefer. A simple starting preference: "Be clear, practical and concise. Ask when an important detail is missing."

4. Keep the background or choose one through **Choose a background**. Save your choices and return to setup.

Names, faces and backgrounds are personal choices. Camera tracking is marked **Coming soon** and is unavailable in this release. The bonus at the end helps you design a custom portrait after your first conversation works.

Choose voice and test your devices

Voice is optional. You can finish setup using typed chat and return to voice later.

Start with Windows speech

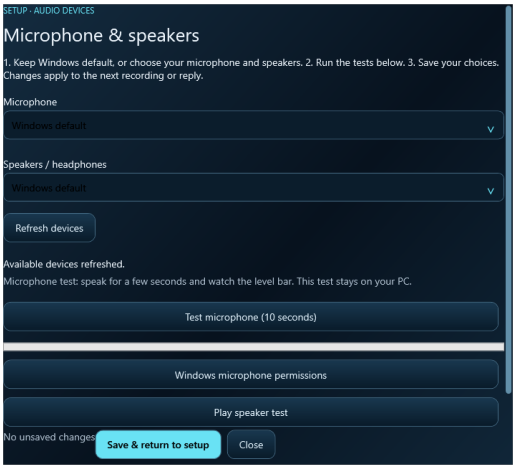
In **Voice > Choose and preview voice**, use Windows for speaking and listening. The **Windows speech** tab lets you select an installed voice, preview it and choose the listening language. Save and return. Available languages and voices depend on this PC.

ElevenLabs is an optional alternative with its own API key and usage charges. You can choose speaking and listening independently. Use its account site if you want to set it up now:

ElevenLabs API keys

https://elevenlabs.io/app/developers/api-keys

Check the hardware



Device controls. Save & return to setup is at the bottom.

1. In **Devices > Test microphone & speakers**, keep Windows default or choose your headset and microphone.

2. Choose **Test microphone (10 seconds)**, speak and watch the level bar. Choose **Play speaker test**; you should hear a short tone.

3. Save and return. These hardware tests stay on your PC; the microphone test does not yet check transcription or an AI reply.

Try a reply and finish setup

In Ready, confirm that your selected brain and other saved choices look right.

1. Keep the sample request or type: "What are three useful things I can ask you to help me with?"

2. Choose **Try my first reply**. Wait for the response. This is a real, small AI request, with possible provider charges; it does not read your vault or perform actions.

3. When the reply arrives, choose **Open chat**. You can now type a request and choose **Send**.

Chat shows **Get your first win** until you have connected one brain, created one business and received one useful reply. It shows only the next action. Its starter requests fill the request box for you to edit; they never send automatically. Hide it at any time, or reopen it through **More > Show getting started**.

Optional: check a spoken conversation

Record microphone > speak > Finish recording > check the words > Send > Read reply aloud. This checks the microphone, transcription, AI reply and playback together. Start with recording before trying hands-free listening.

Set up your first business

With a vault connected, open **Menu > Setup > Business profiles > Add business**. Give it a name and add a short description of what it does and where you want help. Save the business profile, then select that business in **Businesses** before asking about it.

The optional interview adds the less concrete details - priorities, working style and core rules. You can add these later. A blank business SOP document is created for you; you do not need to complete procedures to begin chatting.

Try this first business request:
"I run [business name]. We help [customers] with [service or product]. My biggest challenge is [challenge]. Suggest three practical ways you could help me this week, and ask only for details you need."

Leave other connections until you need them

Email, calendar, web search and MCP services are optional. Find them under **Setup > Connections**. Before connecting email, get the incoming/outgoing server names, ports, security method and password or app password from your provider. For an MCP service, get its official MCP address and sign-in instructions. Ask JARVIS to explain the information you need; enter credentials in the setup screen.

If something is not ready

These are first-setup checks. You can continue typing while you sort out optional voice or device settings.

The brain connection fails

Return to **Brain**. Check that the key belongs to the selected provider and contains no extra spaces. Check API credit or billing on the provider site. Keep or restore the recommended starter model, then choose **Connect & save**. If it still fails, keep the exact error text for support.

The microphone hears nothing

Check headset mute and the selected microphone. In the device screen, choose **Windows microphone permissions**. Allow microphone access and access for desktop apps, then repeat the local test. A moving level bar confirms capture; use Record microphone in chat to test transcription.

Microsoft: microphone permissions

https://support.microsoft.com/en-us/windows/privacy/turn-on-app-permissions-for-your-microphone-in-windows

No voice, or listening language unavailable

Check speaker volume and try the speaker tone. In Windows speech settings inside JARVIS, refresh the installed voices and choose an available voice. If listening is unavailable, add a speech language in Windows language settings or use a configured alternative. Typed chat is still available.

The vault has no matching notes

Check that you chose the folder containing the notes, rather than a parent folder or .obsidian. Create a note named Welcome.md using Notepad (choose All files when saving), or use Obsidian, then search for its title in JARVIS. Reopen the vault screen and use Refresh if needed.

Get help

Every walkthrough step has **Need help with this step?**. Its explanation works without an AI connection. It can open **Create support report** or copy the support address. After the brain works, **Ask JARVIS about this step** places a focused question in chat for you to review before sending.

Email JARVIS support

mailto:support@mydigitaljarvis.com

Tell support which setup step you were on, what you clicked and the exact message shown. A screenshot of that screen can help. Keep API keys, passwords and private notes out of the message.

Setup is complete when a real reply arrives. If you chose a vault, verify a familiar note; if you chose voice, verify a spoken reply. Everyday tasks, reminders, SOP management and connected-service work belong in the separate User Guide.

QUICK SETUP / BONUS

Design a custom avatar face

Once your brain connection works, paste this into JARVIS. Replace the bracketed details with your preferences.

Help me design a custom 2D avatar portrait for JARVIS. First ask me a few short questions about the person or character, hairstyle, expression and overall style I want. My starting idea is [describe your avatar]. I prefer [colors and style].

Then write a complete image-generation prompt for a single square 1024 x 1024 PNG: a front-facing, centered head-and-shoulders portrait; head upright; eyes looking straight ahead; both eyes and the entire mouth clearly visible; lips gently closed; even lighting; clean silhouette; generous space around the hair and head; no text, logo, border or extra faces. Use a luminous blue digital look on a dark background unless I ask for another style. Avoid hands or hair covering the eyes or mouth.

If image generation is available, explain any required setup or cost and help me create the image. Otherwise give me the finished prompt to use with an image generator. Do not claim the portrait is automatically aligned or installed. Remind me to import it through Avatar settings and preview the animation before using it.

Bring the portrait into JARVIS

1. Save the generated portrait as a PNG. Connect your vault first. JARVIS accepts PNG, JPG or BMP up to **4096 pixels per side** and **20 MB**; PNG is recommended.

2. Open **Menu > Setup > Avatar**. Enter a friendly name in **Name for a new face**, then choose **Add prepared avatar portrait** and select the image.

3. Select the face, choose **Preview animation**, and check the mouth and eyes. Choose **Save & use avatar** when you are happy with it.

Import copies the prepared image into your vault immediately; saving applies the selected face. It does not convert a normal photo into a digital avatar or automatically align facial features. Custom animation can vary; the included portraits are the best starting point if a new face does not animate naturally. Backgrounds can be chosen separately.