YOUR ASSISTANT. YOUR BUSINESS. YOUR WAY.

My Digital Jarvis User Guide

From your first setup to useful everyday work.

A plain-English walkthrough for people with ideas, projects and businesses to run. Start with a conversation, then add the tools and repeatable work that make your day easier.

Inside: setup and activation, business profiles, chat and voice, files and images, scheduled tasks, reminders, connected services, briefings, writing, research, documents, procedures and support.

v0.8 - build 0.8026
Updated October 16, 2026

This guide covers the current private release candidate. Screenshots show representative v0.8 workflows with demonstration settings; your accounts and device choices will differ.

mydigitaljarvis.com
support@mydigitaljarvis.com

Copyright 2026 My Digital Jarvis

Find the workflow you need

Click a title to jump to it. PDF bookmarks also provide a navigation list.

01 Install and activate / 3
02 Connect the AI brain / 4
03 Choose a vault and make it yours / 5
04 Teach JARVIS about a business / 6
05 Meet the Assistant screen / 7
06 Have a useful conversation / 8
07 Ask about a file or saved note / 9
08 Create an image in chat / 10
09 Use reference images in chat and tasks / 11
10 Create a task in four steps / 12
11 Give a task the right inputs / 13
12 Schedule, change or duplicate a task / 14
13 Review results and recover from errors / 15
14 Have task results emailed to you / 16
15 Create a personal reminder / 17
16 Connect services to the right businesses / 18
17 Set up email and reply to a message / 19
18 Review your calendar or arrange a meeting / 20
19 Use an MCP service / 21
20 Build a daily briefing that helps you / 22
21 Write with your business context / 23
22 Research a question and use the findings / 24
23 Create Word, Excel or PowerPoint output / 25
24 Write and approve business procedures / 26
25 Return to work and protect your setup / 27
26 Get help without sending private work / 28
27 Create your own avatar portrait / 29
28 Quick reference: what to ask / 30

Read setup first if you are new. Otherwise jump to the job you want to do. Text in **bold** names a screen or control. A route such as Menu > Setup > Connections tells you what to click in order.

Copyright 2026 My Digital Jarvis

WORKFLOW 01 / START HERE

Install and activate

Get the app running first. You can add a face, voice, business and connected services at your own pace.

1. Download Setup.exe from your Payhip purchase email or download page. Close JARVIS, run the installer, then open My Digital Jarvis from Windows Start. Choose your separate vault during setup.
2. For an update, close JARVIS and run the latest full installer. Keep your vault in place. v0.8 has no automatic updater.
3. When the license screen appears, enter the email address used at checkout and paste your Payhip license key. Choose **Activate this PC**. An internet connection is needed.
4. Choose **Continue to setup**. A new installation opens the six-step walkthrough. Reopen it through **Menu > Setup > New-user walkthrough**. If startup fails, use **Create support report**.

Windows may warn about a new independent app

The early independent release may show **Windows protected your PC** or **Unknown publisher**. This SmartScreen reputation warning does not by itself mean malware was found. Continue only with Setup.exe from your official Payhip purchase. Choose **More info**, confirm the file, then **Run anyway**. If that option is unavailable, do not disable Windows security; contact your administrator or support. The Quick Setup Guide explains this in detail.

Three separate things: your JARVIS license unlocks the app; your AI-provider API key connects its brain; your connected-service accounts give it access to email, calendars and other services.

Find your key or change computers

MOVING JARVIS AND YOUR WORK TO ANOTHER COMPUTER
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.

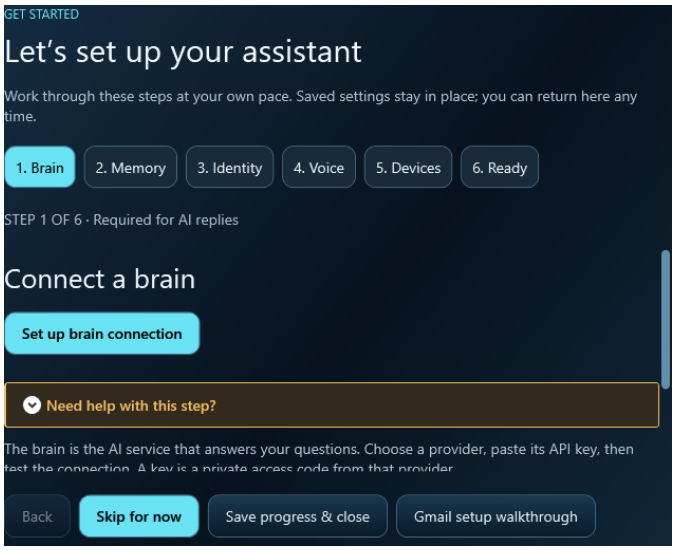
Use the key in your Payhip purchase email or download page. JARVIS checks online at most daily; after a successful check it can continue through a temporary outage for up to **seven days**. A confirmed disabled or refunded key is rejected. Your vault and settings remain intact.

Copyright 2026 My Digital Jarvis

WORKFLOW 02 / MENU > SETUP > BRAIN PROFILES

Connect the AI brain

The brain is the AI service that answers your questions. Start with one working connection; add other choices later.



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

1. Choose **Set up brain connection** in the walkthrough, or open Brain profiles from Setup.
2. Choose a supported provider and model. Use **Get an API key** to visit that provider. Sign in, create an API key and check that API billing or credit is available.
3. Paste the key into the connection settings. Choose **Connect & save** to test and save it. Wait for a successful result.
4. Return to the walkthrough. At **Ready**, try the short test request, then choose **Open chat**.

An API key is a private access code. Keep it out of prompts and support messages. A ChatGPT or Claude chat subscription may not include API usage. Connection tests and AI requests can incur provider charges.

Claude image capability: a compatible Claude vision model can analyze attached images. Anthropic currently does not provide a raster-image generation or editing API. To create images, configure a separate OpenAI profile or an approved image-capable MCP connection. Claude can remain the conversational brain, and JARVIS will not silently substitute another provider.

Save without test stores settings but does not verify access. If a test fails, check the key, billing and selected model. A provider name in the status bar alone does not prove it is connected.

Official starting points: OpenAI API keys and Claude developer platform. Use the provider choices available in your build.

Copyright 2026 My Digital Jarvis

WORKFLOW 03 / MENU > SETUP

Choose a vault and make it yours

A vault is the folder containing your saved notes and business information. Your avatar is the face and voice you work with.

Connect your notes

1. Open **Vault & memory**, or choose **Choose or check vault** in the walkthrough.
2. Create or select a normal folder, such as **Documents > My JARVIS Vault**. An empty folder works; JARVIS creates its starter folders. Keep it outside the application folder. An existing Obsidian vault also works: select its root folder, not an individual note or .obsidian.
3. Check the selected folder. If it contains notes, open **Menu > Vault** and search for a title you recognize. Obsidian is a free, optional app for editing notes; JARVIS does not require it. Optional Sync and Publish cost extra.

Personalize the assistant

1. Open **Setup > Avatar**. Choose a saved face, name, background and preferred tone. Save your changes.
2. Open **Setup > Voice & audio**. Choose speaking and listening preferences, then test the microphone and speakers. Windows speech uses installed voices; ElevenLabs is optional.
3. Open **Setup > Your profile** to add your chat photo, reduce avatar movement or use a conversation-focused display. Choose **Save profile**.

You can begin with typed chat and add the vault and voice later. Business profiles and vault saves need a connected, writable vault. A provider can receive relevant note excerpts when you ask JARVIS to use them. Camera tracking is marked **Coming soon** and is unavailable in this release.

Faces are prepared portraits with alignment settings, rather than automatic 3D conversions. See the custom-face prompt at the end of this guide.

Copyright 2026 My Digital Jarvis

WORKFLOW 04 / MENU > SETUP > BUSINESS PROFILES

Teach JARVIS about a business

Give JARVIS enough context to be useful. You do not need to complete every field on your first visit.

1. Connect a vault, then choose **Add business**. Enter its name and a short explanation of what it does.
2. Choose **More about you - optional** to tell JARVIS who you are, what the business does, where you need help, how you want to work, what matters most and why, and the rules you want followed. Edit the answers inside JARVIS or work on a copy outside it.
3. Add goals, important people and website addresses if useful. Choose briefing preferences for this business. Connections are configured separately; entering an email address here does not connect a mailbox.
4. Save the profile. JARVIS writes it to your vault and creates a blank Business SOPs document for procedures you may add later.
5. Open **Menu > Businesses** and choose **Work on [business name]**. Check the active business before making a request.

Example introduction: I run a small home-service business. Help me respond promptly, keep a friendly tone, and follow up without pressure. My main priority is earning repeat customers. Ask before promising a price or completion date.

Business selection changes the context and connections available to JARVIS. Shared connections can be assigned to several businesses. Use **General conversation** for work that is not tied to one business.

You can also say, "Switch to [saved business name]" or "Switch to [saved avatar name]." Use the saved name and check that the visible selection changed.

Copyright 2026 My Digital Jarvis

WORKFLOW 05 / ASSISTANT

Meet the Assistant screen

The main screen keeps everyday work visible without mixing unlike things together.



The current Assistant screen uses three clear areas plus one continuous context and notification band along the bottom.

Left: type or record a request, attach documents or images, and open Request options only when needed. **Center:** see your avatar and the next two reminders; use the small + to add one directly. **Right:** My To-Dos lists simple checklist items; Assistant Work lists running jobs and results ready to review. **Bottom:** see the active business, brain, voice and listening state. At the right, choose **View** to show Automatic, AI use this month or Next task. JARVIS remembers that choice. Work that needs attention or is ready to review appears temporarily so it is not missed. Select the main footer item for its details.

Select an Assistant Work result to open its full details. You can read it aloud, save it through the relevant workflow, or dismiss it from the dashboard without deleting its history. The top Web research button remains the one place to start website research.

The app remembers the last usable window size, position and maximized state on this Windows account. If monitors change, it moves the window back into view.

Copyright 2026 My Digital Jarvis

WORKFLOW 06 / ASSISTANT

Have a useful conversation

Ask for an outcome in your own words. Add the audience, source material and any rules that matter.

New here? Get your first win shows the next useful setup action, followed by three editable starter requests. It tracks one connected brain, one business and one completed reply. Hide it at any time or reopen it through **More > Show getting started**.

1. Check the active business and avatar. Type your request into the input box. Use the expand arrow inside the box for more editing room. **Shift+Enter** adds a new line; **Enter** or **Send** submits it.
2. Read the response and answer any missing essentials. Continue in the same conversation to refine the result: "Make it shorter," "Use a warmer tone," or "Keep the second paragraph."
3. For speech you want to review, choose **Record microphone**, speak, then **Finish recording**. Edit the transcript before sending.
4. For ongoing spoken conversation, click **Hands-free - Off** to turn it on. It normally ends your request after two seconds of silence. Click **Hands-free - On** to turn it off. Look in **Request options** for auto-read and related guidance.

Hands-free allows up to **40 seconds** per request. At that limit JARVIS pauses hands-free and keeps the transcript for review. Use **Record microphone** for longer dictation; transcription-provider limits still apply.

Control speech and work

Speak replies under Request options controls automatic reading. **Stop reading** appears only while speech is playing; Space also stops playback when you are not typing. **More > Stop session (request and listening)** stops the foreground request and listening. The Assistant Work card opens background progress and results.

Draft a friendly newsletter for my customers about our new service. Use the notes in Service Launch. Keep it under 400 words, include one clear invitation, and do not invent prices.

Copyright 2026 My Digital Jarvis

WORKFLOW 07 / ASSISTANT > ATTACH

Ask about a file or saved note

Use attachments for reports and documents you want JARVIS to read now. Use folder or document names for material already in your vault.

1. Choose **Attach...** below the chat input and select one or more supported documents or images.
2. After attaching, choose **Manage attachments...**. Use the separate window to remove files, choose how each reference image should be used, or check **Save original attached files to this business's vault when I send**. Saving is optional and starts unchecked.
3. Describe what to do with the file. Name the relevant sheets, chapters or sections when possible. Send the request.
4. Check the answer for its stated coverage. Ask follow-up questions in the same conversation. If a section was not read, ask JARVIS to read that section rather than assuming it saw everything.

Read the attached sales report. Compare this month with last month, identify the three biggest changes, and separate facts from your recommendations.

Chat supports **DOCX, EPUB, searchable/text PDF, XLSX/XLS, PPTX, Markdown, TXT, CSV, PNG and JPEG** through the same Attach control. Scanned PDFs need text recognition (OCR) before import. PNG/JPEG references support visual questions and reference-based image creation with an eligible provider.

Large documents are read in bounded portions. Saving the original to the vault does not mean the entire file fits into one AI request. Ask for a chapter range or specific section when needed.

When checked in Manage attachments, saving originals copies them to the selected business's **Attachments** folder when you send. Leaving it unchecked still permits analysis. Local copies support follow-ups and recorded resumes. New/private conversations and business changes clear active attachment selections.

For vault material, try: "Find the Client Updates folder and use the latest newsletter as the structure." If several files match, choose the intended one. Naming a file helps retrieval; it does not grant access to every file or guarantee perfect memory.

Copyright 2026 My Digital Jarvis

WORKFLOW 08 / ASSISTANT > REQUEST OPTIONS

Create an image in chat

Describe an image, review the request and preview the result before choosing where to save it.

1. If you have one eligible image provider, JARVIS can use it automatically. If you have several, open **Request options > Image provider...** or name the eligible connection in your request.
2. Describe the subject, mood, style, composition and intended use. If text should appear in the image, give the exact words.
3. Review the proposed provider, prompt, image size and any charge notice. Confirm only when the request looks right.
4. When the image is ready, preview it. Use **Save image...** for a chosen file location or **Save to vault** for your notes. **Image details** contains provider and file information.
5. Ask for a revision if needed and say to use the previous image. JARVIS can send it as a reference to OpenAI; every revision may incur another charge.

Create a square announcement graphic for my local workshop. Use a warm, welcoming setting and leave clear space for a short title. The only text should be: Weekend Workshop.

Your writing brain and image provider can be different. Claude can analyze attached images, but Anthropic currently does not provide raster-image generation or editing. Image generation therefore needs a separately configured eligible OpenAI or MCP provider. Ordinary MCP read-tool approval does not authorize image generation.

Use recent images in the provider screen to reopen a completed image or check a pending MCP job. If submission status is uncertain, check the provider before requesting another generation. This helps avoid duplicate charges.

For visual matching, follow the reference-image workflow on the next page. Check lettering and details before publishing.

Copyright 2026 My Digital Jarvis

WORKFLOW 09 / ASSISTANT > ATTACH / TASKS > WHAT IT NEEDS

Use reference images in chat and tasks

Show JARVIS what you mean with a photo, screenshot or logo. It can inspect the image and use it when creating a new image.

1. Choose **Attach...** and select up to four PNG/JPEG images, each under 20 MB. Images and documents can be selected together.
2. Open **Request options**. For each image, choose **Appearance / subject** to guide what appears, **Style and colors** to guide the look, **Edit this image** for changes, or **Analyze only** for questions without sending it to image generation.
3. Ask a visual question, or choose an OpenAI image provider and explain what to create using the references. Review the listed references before confirming generation.

Use the attached avatar screenshot for appearance and the logo for branding. Create a fresh square product announcement. Keep the real avatar recognizable. Include: Your business. Your JARVIS. CTA: Explore mydigitaljarvis.com.

References require a brain that supports image input. OpenAI receives actual references for image creation; compatible MCP providers can still generate from text, but reference uploads are not supported there yet. A website URL alone supplies readable text, not its images.

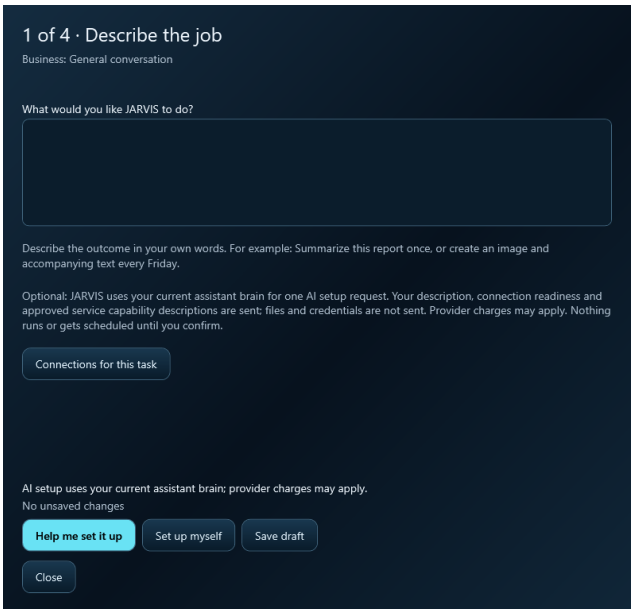
To remove a reference, choose its × chip. Optional **Save attached files to vault** saves originals when you send. Originals remain unchanged; provider copies are resized to fit within 1,568 pixels and have metadata removed. Small lettering may need a closer crop. Always check likeness, lettering and product details before publishing.

Copyright 2026 My Digital Jarvis

WORKFLOW 10 / TASKS > TASKS > CREATE TASK

Create a task in four steps

A task is a reusable job for a specialized AI assistant. Start with one small job and try it once before scheduling it.



Task creation, step 1, shown with demonstration settings.

1. **Describe the job:** say what you want, its audience and the expected result. Choose **Help me set it up** for an editable suggestion or **Set up myself**. Review an AI suggestion before choosing **Use this draft**.
2. **What it needs:** check the task brain, output type, attachments and connected services. Use **Add reference images…** for photos, screenshots or logos; choose how each should be used. These references apply to every run, alongside the current document or chapter. Open optional settings only when needed.
3. **When it should run:** choose **Run once / on demand** or **Repeat**. Set the time zone and preview the next run.
4. **Review and start:** give it a recognizable name and check all settings. Keep **Show this task in Assistant Work** on when you want running work and unread results on the Assistant screen. Turn it off for routine tasks you prefer to check only in Tasks & results. Choose **Run now**, **Save and schedule** or **Save draft**.

The Assistant Work choice changes only that dashboard panel. It does not pause the task or change saving, email delivery, schedules, full results or history. An AI suggestion is a draft, not an activated task. **Save draft** does not start a schedule. Each business can have up to **25 saved tasks**; briefing tasks share that limit.

Copyright 2026 My Digital Jarvis

WORKFLOW 11 / TASK SETUP > WHAT IT NEEDS

Give a task the right inputs

Specific instructions and the right source material make repeatable work more useful.

1. Choose **Text**, **Image** or text plus image as the output. Image runs create one image per run; use the schedule to repeat the job.
2. Choose **Add files**. Inspect the extracted material with **Inspect source coverage** so you know what the AI will receive.
3. For a long book or report, use **Choose chapter or section range**. Choose whether to combine that range or process one section per run. **Use one section per run** creates an ordered sequence.
4. Choose **Use a connected service** if the job needs email, calendar or approved MCP information. Apply the selected services and check the selection summary before saving.
5. Use **Remove attachment**, **Replace attachment** or **Refresh edited file** when source material changes. Review and save the task again.

Each morning, create one different promotional image and a short caption from the next section of the attached book. Vary the setting and composition. Use only details supported by that section.

For a one-off summary, combine the selected chapters if the brain can fit them. For a series, use one section per run. Check the next-source label and the selected range, including any prologue or introduction.

Task sources support DOCX, EPUB, searchable/text PDF, TXT/Markdown, Excel XLSX/XLS and PowerPoint PPTX. Convert older .ppt files to .pptx or searchable PDF. Embedded visuals and complex layout are not fully interpreted.

If the request is too large, narrow the range or review the task brain's input allowance. Your configured character allowance is separate from the provider's actual model limits. Raising it does not increase the provider's capacity.

Copyright 2026 My Digital Jarvis

WORKFLOW 12 / TASKS > TASKS > TASKS & RESULTS

Schedule, change or duplicate a task

A clear name, schedule and next-run confirmation make it easy to know what will happen.

1. Select a task and choose **Edit**. In **When it should run**, choose its repeat pattern, starting date, time and time zone.
2. Use **Preview next run**, then review and save. Read the schedule confirmation and next due time. A saved draft can remain inactive; use **Save and schedule** or **Enable schedule** when ready.
3. To stop automatic runs, select the task and choose **Pause schedule**. If an active run prevents an edit, use the editor's pause/stop controls or stop that run in the task view, then finish saving your edits.
4. For a similar job, choose **Duplicate task**. Give the copy a new name, change the timing and review its sources, provider and spending options before activating it.

JARVIS must be open and your PC awake. If a scheduled time is missed, one overdue run waits until the app is available again. Do not rely on it to replay every missed occurrence.

Understand the controls

Try once / Run now adds a manual run without moving the repeating schedule. **Remove schedule** removes automatic timing. **Rework last completed item** runs that item again rather than using the next one. **Delete task** removes the definition; completed history and files remain.

A duplicated task is an independent draft. Automatic-email permission must be reviewed and authorized again. Under optional brain and spending settings, estimates are planning allowances, not exact provider prices or guaranteed billing caps.

Copyright 2026 My Digital Jarvis

WORKFLOW 13 / TASKS > TASKS > TASKS & RESULTS

Review results and recover from errors

Each run has its own history. Select the run you want before taking an action.

1. Select the task, then a run under **Run history and recovery**. Read its status, result and any action needed.
2. Use **Open results** to open the local output folder. For an applicable waiting state, use **Approve vault save** or **Approve and advance**.
3. Choose **Dismiss result** if you do not need an active review item. This does not force a vault save or permanently delete its files.
4. Use **Clean up finished runs** to hide completed or abandoned entries. Check **Show archived runs** to find them later; select a run and choose **Restore archived run** if needed.

Default vault output goes under **Task Output / [business] / [task name and date]**. A custom task output folder takes precedence. Run details show the actual saved location.

Email-enabled results save to the vault immediately. Other ready, unread results are saved before the next scheduled or manual run so they do not hold up future work. A real failure or failed save still needs attention.

Recover without blindly repeating work

Read the error first and fix the named cause. **Retry unfinished steps** reuses completed work where available. **Stop run** stops active work. **Abandon run** ends unfinished work without advancing its source item.

For an uncertain provider call or send, review the provider's records and existing files before authorizing another attempt. A timeout can still have produced output or a charge. If unclear, create a support report rather than repeatedly running it.

Copyright 2026 My Digital Jarvis

WORKFLOW 14 / TASK SETUP > EMAIL ME THE RESULTS (OPTIONAL)

Have task results emailed to you

You can authorize a particular task to send its results automatically. Ordinary conversational emails still require review.

1. Set up a sending-capable email connection and assign it to the task's business. Test it first.
2. In task setup, choose **Email me the results (optional)**. Select an eligible sending connection and enter the recipient address.
3. Review and authorize automatic delivery for this task. Check the sender and recipient carefully, then save the task.
4. Run it once. Confirm the result reached your inbox and check the task's separate delivery status and saved vault location.

Example: Run a daily sales summary at 6 PM, save the results to my vault, and email them to my personal address using the business mailbox.

The recipient can be a different address from the sending mailbox, including your personal email. You do not need a second connected mailbox just to receive the result.

A saved mailbox alone does not enable automatic delivery. Authorization belongs to the individual task. Copies need fresh delivery authorization.

Text output is sent as the result body; image output can produce an image-ready notice. Check the received message before depending on it as your only route to the output. Do not assume an image file is attached.

Generation and email delivery are separate outcomes. If generation succeeds but delivery fails, keep the completed output and inspect the delivery status. An uncertain send is not automatically repeated, which helps prevent duplicate messages.

Copyright 2026 My Digital Jarvis

WORKFLOW 15 / TASKS > REMINDERS

Create a personal reminder

Reminders tell you to do something. Tasks do work for you. Reminders belong to you across all businesses.

1. Ask the avatar for a reminder with a specific date, time and message, or open **Tasks > Reminders** to enter it yourself.
2. Check the date, time zone and the words the avatar will say. Resolve any confirmation JARVIS requests.
3. Open **Reminders** and verify the new reminder appears in the saved list. The avatar screen also shows your next two reminders, with their due date and time underneath. A conversational promise alone is not your final check.
4. To change or remove it, select it in Reminders, edit and save, or choose the delete control and confirm.

Remind me on October 12 at 9 AM local time: Review the workshop registration list before lunch.

When a reminder occurs, it stays on the avatar screen until you choose **Checked**. It then disappears and the next reminder takes its place. If JARVIS was closed when it was due, it announces the missed reminder after the greeting when you next open it.

Choose the right kind of item

Use a reminder for "Call the supplier tomorrow." Use a task for "Summarize my supplier emails each morning." The optional **Personal checklist** inside Reminders keeps manual to-dos; those entries have no scheduled announcement.

Deleting a reminder removes its schedule and record. A reminder message already recorded in conversation history can remain there.

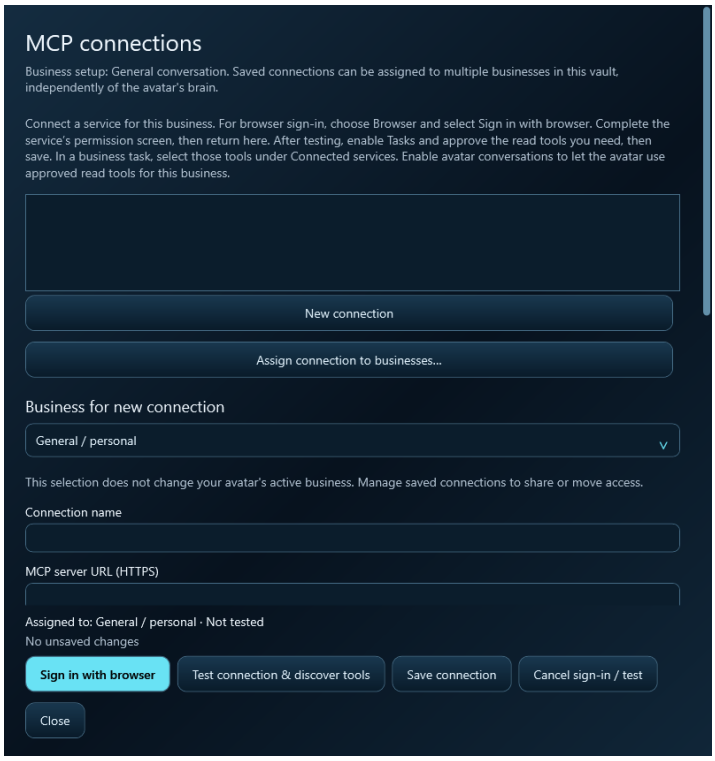
If you do not see the reminder, ask JARVIS to check it or enter it directly. Check the saved list before relying on it for an important deadline.

Copyright 2026 My Digital Jarvis

WORKFLOW 16 / MENU > SETUP > CONNECTIONS

Connect services to the right businesses

Save a connection once and assign it to the businesses that should use it. You do not need to switch your active business just to manage assignments.



MCP connection setup. Supply the service address, test it and choose its business assignments.

1. Choose the connection type: generic email, Gmail, Google Calendar or MCP. Supply the information requested by that screen and test it.
2. Select the business or businesses allowed to use it, review permissions, and save.
3. To change assignments later, open **Manage saved connections & businesses**. Select the connection and choose **Assign to businesses...**. Save the updated selection.
4. Return to the intended business and test a simple request. For tasks, select the service in that task too.

Sharing an email connection shares the same incoming folder. Sharing a calendar uses the same selected calendar. Removing an assignment can affect tasks that depend on it; check those tasks after a change.

The current generic-email setup allows one mailbox per business. AI brains, voice and web-search credentials remain app preferences. A connection in a profile is not automatically ready or permitted for every action.

Copyright 2026 My Digital Jarvis

WORKFLOW 17 / MENU > SETUP > CONNECTIONS > EMAIL

Set up email and reply to a message

Use generic IMAP/SMTP for providers that support it, or the separate Gmail sign-in for a Google mailbox.

Generic email setup

1. Get your provider's incoming IMAP server, port, security setting, username and password or app password. Use the complete email address when your provider requires it.
2. Open **Email (IMAP / SMTP)**. Enter those settings, select the incoming folder and business assignments, and review permission for AI processing.
3. If you want to send replies, enable sending and enter the outgoing SMTP server, port and security setting supplied by the provider.
4. Choose **Test connection**. After success, use **Test & save connection** to save. For Gmail, use **Gmail account & permissions** and follow Google's sign-in instead.

Read and respond

1. Select the business, open **Menu > Email** and choose **Summarize last 24 hours**, or ask the avatar about a specific message.
2. Ask for a reply draft and identify the message by sender or subject. Check the sender account, recipient, subject and body.
3. Use the review/send workflow and explicitly confirm sending. If JARVIS presents several eligible accounts, choose the intended one.

Find the recent email from Alex about the workshop. Draft a warm reply saying I will send the schedule tomorrow. Show me the reply before sending.

If an app password is required, copy the actual generated password when the provider displays it. A label or name for that password is not the password itself. Summaries use limited message excerpts and exclude attachments.

Copyright 2026 My Digital Jarvis

WORKFLOW 18 / MENU > SETUP > CONNECTIONS > GOOGLE CALENDAR

Review your calendar or arrange a meeting

Connect the calendar, assign it to your businesses and start with a simple appointment lookup.

1. Open **Google Calendar** in Connections. Sign in, grant the permissions you intend to use and select the calendar.
2. Assign it to the relevant businesses and save. Use one shared assignment if those businesses use the same calendar.
3. Ask JARVIS to show your appointments for a named date. Check the date and time zone.
4. To create or change an event, give the title, date, time and duration. Review JARVIS's concise confirmation and full onscreen details, then approve the change.

Schedule a 30-minute planning meeting tomorrow at 2 PM local time, titled Workshop planning. Tell me the date and time and ask for confirmation before creating it.

Use the calendar in a task

Create a task such as "At 6 PM each weekday, summarize tomorrow's meetings and what I should prepare." In **What it needs**, choose **Use a connected service** and select the calendar read tools. Check the applied selection before saving and scheduling.

Connecting a calendar does not automatically select it for every task. A task needs the allowed service selected, and its business must have access.

Be careful with recurring events: specify whether you mean one occurrence or the supported series scope. "This and following" changes are not supported. Do not assume a calendar account grants access to every calendar on it.

Copyright 2026 My Digital Jarvis

WORKFLOW 19 / MENU > SETUP > CONNECTIONS > MCP CONNECTIONS

Use an MCP service

MCP is a way for a service to offer tools that JARVIS can use. You supply its connection details and choose which tools to approve.

1. Get the MCP address and sign-in instructions from the service provider. Add a connection with a recognizable name and assign the intended businesses.
2. Test or discover the connection. If browser sign-in is required, complete it in the browser and return to JARVIS. Confirm that the tools are listed.
3. Open the tool selection screen. Use the checkboxes, **Select all** or **Select none**, then approve the selected eligible tools. The main list shows approved tools.
4. Enable approved tools for tasks, avatar conversations or both, as available. Save the connection after changing approvals or permissions.
5. For chat, select an assigned business and name the service in a simple request. For a task, choose **Use a connected service** and select the approved tools it needs.

Using Campaign Reports, review my latest sent campaign. Give me the key results and three practical recommendations. Do not create or send anything.

Ordinary MCP use in this release reads information. Approving a vendor's tool list does not make campaign creation, social posting or other write/update actions available. Compatible image generation has a separate explicit permission setup.

For images, use **Image generation settings...** to choose and enable the generation tool and any job-status tool, then apply and **Save connection**. Select it through Image provider in chat or task setup. Compatibility depends on the service's tool schema and supported result format.

If a result is too large, narrow the date range or fields, or ask for a summary. A small date range can still contain a large amount of detail.

Copyright 2026 My Digital Jarvis

WORKFLOW 20 / MENU > DAILY BRIEFING

Build a daily briefing that helps you

Bring together the information that matters today without creating a separate task management system.

1. Add your business websites and briefing preferences in the business profiles. Connect and assign the email and calendar sources you want included.
2. Open **Setup > Location & weather** for local weather. Open **Setup > Briefing & monitoring** to choose the automatic time, time zone and sections.
3. For custom briefing work, create or edit a task in Tasks and enable **Include in daily briefing**. Choose its own schedule and connected services there.
4. Open **Daily briefing**, check the selected businesses and choose **Run briefing now**. Read or listen to the highlights, then expand the fuller results and source details.
5. Choose **Save report to vault** if you want the full briefing note. Use **Open saved note** after a verified save.

Give me today's briefing for my businesses. Highlight meetings, urgent email and any completed briefing tasks. Keep the spoken summary short.

A shared email or calendar connection should appear once with the correct shared scope. Separate business sources can have separate coverage. Briefing tasks count toward the same **25 tasks per business** limit.

A missing source, failed read or uncertain priority assessment is not proof there is nothing urgent. Check the source details and review your inbox when needed.

Automatic checks need JARVIS running and the PC awake. Manage task definitions and schedules in Tasks; the briefing displays the assigned work and available results.

Copyright 2026 My Digital Jarvis

WORKFLOW 21 / ASSISTANT OR MENU > WRITING

Write with your business context

Use your profile, approved procedures and named reference material to get a draft that fits your business.

1. Select the business and state what you need: a newsletter, article, customer response, summary or other draft.
2. Give the audience, purpose, tone and approximate length. Name a vault folder or attach reference material if it matters.
3. Answer missing essentials and review the draft. Ask for targeted changes in the same conversation rather than starting from scratch.
4. Check facts, links, prices and promises. Choose the available save or export action and review the destination before confirming.

Create an October newsletter for my workshop business using the notes in Upcoming Events. Use a friendly tone, keep it under 500 words and include one invitation to register. Ask me for missing dates or prices instead of guessing.

You can ask JARVIS to find a folder by name. If several folders or documents match, identify the one you mean. Its knowledge of your vault is based on relevant retrieval, not automatic reading of every file.

Keep follow-ups specific

Try "Use the previous newsletter as the structure," "Keep the introduction but replace the offer," or "Save this version in Client Updates." Confirm where the finished work was saved. A response in chat and a saved document are separate things.

Creating written content does not publish it, send a campaign or create an email-marketing automation. Those actions require a supported workflow and its permissions.

Copyright 2026 My Digital Jarvis

WORKFLOW 22 / WEB RESEARCH

Research a question and use the findings

Research work can continue in the background while you talk with JARVIS.

1. Open **Web research** or ask the avatar to research a topic. Give a clear question, what decision it should support, and any specific public pages to examine.
2. If using web/news search, configure its supported provider under **Setup > Connections > Web search & research settings**. Direct public-page reading and search are different routes.
3. Review the proposed scope and authorize the research when asked. Keep JARVIS open while it works.
4. When complete, read the report and its source links. Check coverage, dates and any unanswered questions.
5. Save the full report to the vault or use it as the selected source for a document export.

You can request research and a finished draft together. For example: "Read this public page, then write our customer newsletter using its facts and these dates." JARVIS keeps the requested deliverable with the research, announces when it moves into Writing, and opens the draft for review. It does not save or send the draft automatically.

Research practical ways a small local workshop can attract repeat customers. Compare three approaches, use public sources, and separate evidence from your recommendations.

A related follow-up can refer to work already running. Ask "What is the status of that research?" before starting another search. If you want a fresh or narrower search, say so clearly.

Public-page access can fail for sign-in pages, blocked sites or unsupported content. JARVIS explains when a site blocks automated reading or does not provide enough readable evidence. Try another public page, or paste or attach the relevant information. Check important claims against the linked source before acting.

Hearing the highlights does not automatically save the full report. Use its save control and check the saved-note status. If research is interrupted, inspect the existing workflow and results before resuming so completed work can be reused.

Copyright 2026 My Digital Jarvis

WORKFLOW 23 / MENU > DOCUMENTS

Create Word, Excel or PowerPoint output

Turn a supported draft or report into a file you can review, edit and share.

Word and Excel

1. Select the research report or writing result you intend to use. A newer report does not automatically replace your selection.
2. Choose the available Word or Excel export. Review the source, destination and Excel table preview when shown.
3. Generate the file, then check its file-save and vault-save outcomes separately. Open it and review the content before sharing.

A short PowerPoint presentation

1. Choose **Create or review PowerPoint**. Use the latest completed research or **Choose source file...** for a supported DOCX, Markdown or TXT source.
2. Enter the purpose and audience, choose the slide count, then **Create outline in background**.
3. Review and edit the outline under **Review and generate**. Check optional image requests and costs before authorizing generation.
4. When finished, choose **Open saved PowerPoint**. Check every slide and the speaker notes before presenting.

The current PowerPoint workflow makes **3 to 12 slides**, including the cover, with up to **3 generated images**. Layout sketches guide the review; the final file is the result to inspect.

Installed Microsoft Office is needed for the app's Office launch actions. Generated files can also be reviewed in a compatible application. JARVIS is not a general editor for every existing Office file.

Organizing prose into Excel data may need an additional AI request. File reading support does not mean every chart, formula, image or layout is understood.

Copyright 2026 My Digital Jarvis

WORKFLOW 24 / MENU > BUSINESSES > BUSINESS PROCEDURES FOR [NAME]

Write and approve business procedures

An SOP is a standard operating procedure: a clear description of how you want a repeatable piece of work done.

1. Open the business's procedures and use **1. Write document**. A new business starts with a blank SOP document.
2. Write one or two procedures. State when each applies, its steps, expected result and required approvals. Under **Choose examples - optional**, add an example or view the shared template and adapt only what you need.
3. Choose **Save & review with JARVIS**. It proposes numbered procedures and identifies missing or unclear details.
4. Under **2. Review & approve**, select each procedure. Edit it or choose **Apply JARVIS's recommendations** to fill the editable draft, then review what changed.
5. Choose **Save procedure edits**, then **Check with JARVIS**. Resolve remaining questions. Choose **Approve this procedure** when ready.
6. Try a realistic request that uses the procedure. Use **Record practical test** to note what you tried and whether it worked.

Customer inquiries: When a customer asks about a workshop, acknowledge the question, explain the available options using our current notes, and ask before promising a discount. The result should be a clear reply ready for my approval.

The shared template is stored at the vault level, not separately inside every business. Imported procedures are drafts until approved. AI review is a useful check, not certification that a procedure works in every situation.

Approved procedures can guide relevant business chat, writing and tasks, within app permissions. Saving edits creates a draft; approve the reviewed version to activate changes. Use **Disable procedure** when it should stop guiding work.

Copyright 2026 My Digital Jarvis

WORKFLOW 25 / MENU > CONVERSATION HISTORY / SETUP > BACKUP & RESTORE

Return to work and protect your setup

Saved conversations and notes let you return to your work. Backups help you move or recover your configuration.

Find an earlier conversation

1. Open **Conversation history**. Find the recorded session, read it and use its resume action to continue.
2. Check the business context and reference material before requesting a new action. Resuming is not an instruction to repeat old actions.
3. Under **Setup > Conversation history**, choose recording and retention preferences. Pausing recording does not delete existing sessions.

Make a settings backup

1. Open **Setup > Backup & restore**. Choose **Create encrypted backup...** and set a strong password.
2. Store the backup and its password separately. The password cannot be recovered.
3. Copy your vault and documents separately, or use the optional vault-copy choice. The encrypted settings file does not contain all your work files.
4. On a new PC, install JARVIS, choose the backup, use **Unlock & review**, then **Restore & restart**. Select the copied folders, test devices and reconnect services when asked.

Business profiles and recorded history provide persistent context, not unlimited model context or perfect recall. Keep important rules and facts in clear, named business notes rather than only in a long chat.

Your license activation is separate from restoring settings. Do not assume all task outputs, run history or local image files travel in a settings backup. Keep copies of work you need and test restored connections before relying on scheduled jobs.

Copyright 2026 My Digital Jarvis

WORKFLOW 26 / MENU > HELP & SUPPORT

Get help without sending private work

A support report gives us technical clues. You choose when to save and send it; nothing is emailed automatically.

1. Open **Help & support**. The **Create support report** window opens. You do not need a working AI or email connection.
2. Optionally describe what you were doing, what you expected, what happened and approximately when. Leave out passwords, keys and private business content.
3. Choose incidents from **Last 24 hours** or **Last 7 days**. Use **Focus on an incident** if you can identify the matching one.
4. Read **Preview - included information**, then choose **Save support report...**. Save the ZIP somewhere easy to find, such as Downloads.
5. Open your usual email app and send the ZIP yourself to **support@mydigitaljarvis.com**. Include the onscreen support reference, if available, in the subject.

During guided setup, expand **Need help with this step?** for a local explanation and support-report shortcut. Once the brain works, its Ask JARVIS option places a focused help question in chat for you to edit; it does not send automatically.

The report excludes credentials, license keys, settings, vault documents, emails, conversations, manuscripts and provider responses. **Your typed description is included exactly as written**, so review it before sharing.

Reports contain build/system information and available bounded technical incidents. An empty report does not prove nothing went wrong. If JARVIS will not open, email the visible error and approximate time instead.

Try these first

No AI reply: test the brain connection and check provider credit. **Service unavailable:** check its business assignment and permissions. **Task did not run:** check it is scheduled, its next due time, and that JARVIS was open and the PC awake. **Source too large:** select fewer sections. **Cannot find output:** inspect the run's saved location and archived history.

Use **Setup > Voice & audio** for silent playback or microphone issues. If a send or generation is uncertain, inspect existing results before retrying. Updates use a new full installer supplied by JARVIS. Close the app before updating, use the same installation location, and keep your vault in place. Automatic updates are deferred to v1.0 or later.

Copyright 2026 My Digital Jarvis

WORKFLOW 27 / BONUS WORKFLOW > SETUP > AVATAR

Create your own avatar portrait

Use this starter prompt in an image-generation service. The result still needs import, alignment and a preview in JARVIS.

Create a front-facing digital assistant portrait for a desktop avatar. Show a single head and shoulders, centered, looking directly at the viewer. Use a neutral relaxed expression, closed mouth and clearly visible eyes. Keep hair away from the eyes and mouth. Use crisp facial features with a bright cobalt-blue digital glow against a dark background. Avoid text, logos, hands and extreme camera angles. Leave space around the head so the portrait can be cropped. Personality: [friendly / thoughtful / professional]. Appearance: [describe the face and hair]. Background: [describe the scene or color].

1. Replace the bracketed choices with the look you want. Generate the portrait and save the image locally.
2. Open **Setup > Avatar** and use the portrait import controls. Give it a friendly name and choose a background as available.
3. Adjust the mouth and eye alignment using the available controls, then choose **Preview animation**. Try speaking and listening states.
4. Choose **Save & use avatar** when it looks right. Reopen settings to refine alignment if needed.

A regular photograph or generated face does not automatically become a fully rigged model. Frontal, clearly visible features make alignment easier. Keep a copy of the original portrait and use images you have permission to use.

This release uses 2D portraits. During work, the avatar can show a closed-eye blue activity cue. Fully articulated 3D avatars are future work.

Want help refining the prompt? Once its brain is connected, ask JARVIS: "Help me design a custom avatar portrait that will be easy to align in JARVIS. Ask me about its style and personality."

Copyright 2026 My Digital Jarvis

WORKFLOW 28 / KEEP THIS PAGE HANDY

Quick reference: what to ask

Start with a clear result, add the source or business, and say what should happen next.

Try these requests

Find information: "Find the notes in Client Updates and summarize the latest plan."

Draft content: "Write a friendly customer email from this outline. Show me the draft before sending."

Review a report: "Read the attached spreadsheet. Explain the biggest changes and which sheets you used."

Create an image: "Create one square promotional image using [configured provider]. Let me review it before saving."

Prepare for tomorrow: "Use my connected calendar to summarize tomorrow's meetings."

Set a reminder: "Remind me on [date] at [time] to [message]." Check it under Reminders.

Make repeatable work: "Help me set up a weekly task that summarizes my campaign results and emails them to me." Review it in Tasks before activating.

Five words you will see

Brain: the AI provider and model. **Vault:** your notes folder. **Business:** saved context and service assignments. **Task:** work JARVIS runs. **Reminder:** a message that tells you when to do something.

Check completion: a draft is not a sent email; a conversation is not a saved full report; a saved task draft is not an active schedule. Look for the confirmed action, saved location or next-run time.

Website: mydigitaljarvis.com
Support: support@mydigitaljarvis.com
Version: use the actual number in the top-right header. The obsolete sidebar "Windows preview - 0.3" text is scheduled for removal after release.

Copyright 2026 My Digital Jarvis