# MindMarshal User Guide

This guide explains the current public desktop releases. Button names are shown in **bold** so you can match them to the app. This guide does not ask you to disable operating-system security, or share a password, API key, OAuth token, backup passphrase, or private workspace with anyone.

For the current data-practice details, see the Privacy page on the official release site or `docs/PRIVACY-POLICY.md` in the source and release materials.

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## 1. Start with the local workspace

MindMarshal is a local-first workspace for notes, projects, databases, and focused optional assistance.

- You do not need a product account or cloud workspace to write, organize, search, or plan locally.
- Core workspace content lives in the app's local data directory on your computer.
- The app remains useful without an internet connection. Network access is used only for optional services that you configure, such as an AI provider, web research, chat integrations, or a collaboration relay.

- Core workspace data is not sent to the publisher by default.

### The current Free Core and Pro AI boundary

- Free Core keeps manual local pages, databases, journals, rows, templates, imports, editing, search, backup, restore, and export unlimited, with no product account or time limit.
- Pro AI is an optional one-time US$29 license for AI, research, workflows, and automation. Provider usage can cost extra. If a trial or entitlement ends, Pro turns off but the workspace remains writable in Free Core.
- Unlimited Free Core ships on macOS and Windows in 0.1.24. The macOS build is signed and notarized. The Windows installer is Authenticode signed and timestamped; verify the publisher shown by Windows before continuing.

### The important AI boundary

Connecting an AI provider does **not** make ordinary editing automatic:

- opening a page or board does not send its content to a provider;
- simply typing or pausing while typing does not send content to a provider;
- a direct AI request starts only when you choose a button, command, or shortcut such as **Ask AI**, **Continue writing**, **Get an AI suggestion**, inbox organization, project planning, or a daily-note reflection;
- a workflow can run later only after you explicitly configure an automation trigger for that workflow.

Before sending private or regulated material to an external provider, review that provider's terms, retention policy, and your own authorization to share that information.

**Settings → AI & Automation** is the one place for governance. It holds the two choices everything else obeys: *where content may go* (any provider, only models on this Mac, or never) and *working without being asked* (off, propose, or act), plus links to Run, stage workflows and the global pause, MCP clients, and Activity, and the transparency log of what has left this device.

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## 2. Install the macOS release

Use the signed, notarized DMG from the official release site.

1. Open the downloaded `.dmg` file.
2. Drag **MindMarshal** into **Applications**.
3. Eject the disk image after the copy finishes.
4. Open the app from **Applications** or Spotlight.

Do not follow instructions from an unfamiliar site that tell you to disable macOS security features or run a command to remove quarantine. A normal public release should open through the ordinary macOS flow. If macOS reports an unexpected warning, verify the source, version, and published release notes before proceeding.

### First launch

The first-run setup can create a useful starting structure, including a Projects database, a Journal, and a Welcome page. You can skip optional AI sign-in and use the workspace without it.

To repeat the setup later, open **Settings**, choose **General**, and select **Replay** in the **Onboarding** section.

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## 3. Learn the main window

Most navigation is in the left sidebar.

| Area | What it is for |
|---|---|
| **Home** | A calm overview of work that may need attention today. |
| **Today** | Opens or creates today's daily note. |
| **Search** | Searches workspace content and opens the command palette. |
| **Inbox** | Holds quick captures until you decide where they belong. |
| **Activity** | Shows recorded workflow and agent actions, including actions that can be undone. |
| **Settings** | Opens General, AI Providers, Integrations, Appearance, Backup, and Collaboration settings. |
| **PRIVATE** | Your nested page tree. You can rename, reorder, and organize pages here. |
| **Library** | Saved page templates. |
| **Trash** | Deleted pages that can be restored. |
| **New** | Creates a new page. Its adjacent menu also offers a database, project, or template. |

### Appearance

Use the theme control near the bottom of the sidebar, or open **Settings → Appearance**, to choose Light, Dark, or System appearance. The System option follows your operating system's setting.

You can change zoom in **Settings → Appearance**, or use `⌘ +`, `⌘ −`, and `⌘ 0` to zoom in, out, and reset.

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# 4. Write pages and connect ideas

### Create a page

1. Choose **New**, or press `⌘ N`.
2. Enter a title.
3. Write in the editor and press `Enter` to continue.

Pages can contain other pages, so a simple note can become a project outline or reference library without forcing a rigid structure first.

### Use the slash menu

Type `/` in an empty editor line to open the block menu. Start typing to filter it. Common blocks include:

- text and headings;
- to-do, bulleted, and numbered lists;
- quotes, toggles, callouts, dividers, and code blocks;
- images, charts, equations, and embeds;
- editable tables, flowcharts, and visual designs;
- templates and explicit AI actions.

When the cursor is inside a table, the formatting toolbar adds controls for adding or removing rows and columns, merging or splitting cells, toggling a header row, and deleting the table. Chart blocks can import pasted CSV or Markdown-table data and export the current data as CSV.

### Start from an idea on the Home screen

The Home screen leads with **Start something**. Type a rough idea, choose what you want done with it, and press **Start** (or `Cmd/Ctrl+Enter`):

- **Think it through** — the assumptions, the strongest objection, and what you would need to know to decide.
- **Make it a plan** — the first three steps and the thing most likely to stop it.
- **Draw it** — a real flowchart of how it works.

MindMarshal creates a page titled from your idea, writes the idea onto it, and opens the chat already working on it. The idea is written down either way, so nothing is lost if you decide not to use the answer.

### Ask the chat to build things

The AI chat does not only answer questions about your pages. Asking it to make something makes it. For example:

- "Make a flowchart of this page."
- "Make a flow chart from my documents about onboarding."
- "Draw a diagram of how a support ticket moves through the team."

A request naming your documents ("my notes", "my pages", "in MindMarshal") searches your workspace for the relevant pages; otherwise the current page is used. The reply names the pages it drew from, and the diagram is added to the bottom of the page as a normal flowchart block you can edit.

### Draw a flowchart

Choose **Flowchart** from the slash menu. The block starts with a start shape and a first step already joined, so the canvas is never a blank puzzle.

The canvas is direct: there are no modes to switch on first.

- Add a shape from the row of shape buttons. It lands in the middle of what you are looking at and opens for typing straight away.
- **Draw an arrow** by dragging from one of the round handles on a selected shape and dropping it on another shape. The shape you are about to connect to lights up.
- **Edit text** by double-clicking a shape and typing on it. Enter finishes, Shift+Enter adds a line.
- **Move shapes** by dragging them. A single shape snaps to line up with its neighbours' edges and centres, and a pink guide shows what it lined up with.
- **Select several** by dragging across empty canvas, or Shift-clicking. With more than one selected, the toolbar offers align and even-spacing controls, and dragging moves the whole group together.
- **Move around** by holding Space and dragging, or dragging with the middle mouse button. Scroll to pan and pinch (or Ctrl+scroll) to zoom. The zoom readout is a button: click it to fit the whole diagram.

Keyboard: Tab adds the next connected step, Enter renames the selected shape, arrow keys nudge (hold Shift to nudge further), Cmd/Ctrl+D duplicates, Cmd/Ctrl+A selects everything, Cmd/Ctrl+0 fits, and Delete removes what is selected. Deleting a shape removes its arrows too.

**Tidy up** lays the whole diagram out from its arrows. **Export SVG** saves the picture. In Word and PDF export a flowchart appears as its picture followed by a numbered list of the steps, with each decision's branches ("yes", "no") written under it. Markdown export writes the same numbered list, so the flow still reads correctly in any editor.

### Format text

The formatting toolbar supports font family and size, bold, italic, underline, strikethrough, inline code, colors, highlighting, links, lists, alignment, and emoji. Formatting controls are intentionally unavailable while the cursor is inside a code block.

### Add a web link

Select some text and press `Ctrl+K` (`Cmd+K` on macOS), or use the link button in the formatting toolbar. Type an address such as `example.com` and choose **Add link**; the address is completed to `https://` for you. Selecting an existing link lets you update or remove it.

Ctrl-click or Cmd-click a link to open it in your default browser. Ordinary clicks keep editing, so a link never interrupts your writing.

Pasting content from a web page keeps its links. Only `http`, `https`, and `mailto` addresses are accepted, so a pasted page cannot smuggle a script address into your document; unsupported addresses keep their text and lose only the link. Links are preserved by Word and Markdown export.

### Link pages

Type `[[` followed by a page name to link to another page. The app can show backlinks and related pages so connected work is easier to find later.

### Work with selected text

Select text to reveal the **Ask AI** menu when an AI provider is configured. Seeing the menu does not send anything. Choosing an action such as **Improve writing**, **Fix grammar**, **Summarize**, **Turn into to-dos**, **Diagram this**, or a custom prompt creates the actual provider request.

**Diagram this** is worth calling out: instead of describing your process in prose, it inserts a real flowchart block built from what you wrote. Every shape and arrow is then yours to drag, rename, recolour, and extend, exactly as if you had drawn it. It reads your selection, or the whole page when nothing is selected, and tells you how many shapes and arrows it produced before you insert anything.

For a substantial brief, ask AI to **chart the work**, **lay out the brief**, or **make the page presentation-ready**. MindMarshal can compose the response from the same native blocks available in the editor: vector charts, graphical flowcharts, visual-design canvases, tables, callouts, and formula spreadsheets. Finished designs and diagrams appear as clean artwork in the page. Select **Edit design** or **Edit flowchart** to open the full manual tool without converting or recreating the AI output. Text-made bars, box-drawing lines, and ASCII diagrams are not used as substitutes for those native blocks.

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## 5. Use databases for structured work

A database is a structured collection where each row can also open as a full page. Use one when a collection needs repeatable fields, multiple views, or a workflow.

Create one from the menu beside **New** with **New database**.

### Choose a view

The same underlying data can be shown in several ways:

| View | Useful for |
|---|---|
| **Table** | Reviewing rows and columns together. |
| **Board** | Moving cards through stages. |
| **Timeline** | Planning date-based work over time. |
| **Calendar** | Viewing items by month and date. |
| **List** | A compact sequence of items. |
| **Gallery** | Larger card-style browsing, especially for visual content. |
| **Chart** | One chart over the rows the current filter yields: count, sum, average, minimum, or maximum of a number property, by a select, checkbox, date (per month), or text property, as a bar, line, area, pie, or donut. |

**Chart** uses the same filter and sort as the table beside it, so what you chart is exactly what you see. Rows whose value is not a number are skipped and the caption says how many. The chart is drawn by the same renderer as chart blocks in pages, and its settings are saved with the view.

In **Timeline**, drag a bar to move the item without changing its duration. Drag either end of a date range to resize it, or click the bar to enter exact start and end dates. Action plans created by MindMarshal include scheduled start and end dates so their tasks appear in Timeline immediately.

### Add properties

Use the + control in the property header to add fields. Available property types include text, number, select, multi-select, date, checkbox, URL, formula, relation, and rollup.

Use **Filter**, **Sort**, and grouping controls to focus a view. Those choices are saved with the database view so you can return to the same perspective later.

### Open a row as a page

Open a row title to add notes, context, links, checklists, or supporting material. The row page is useful when a task or record needs more than a few properties.

### Ask for a board suggestion only when you want one

Cards that have not moved for a while can be marked **stuck**. If an AI provider is configured, the board shows **Get an AI suggestion**. Choosing it sends a compact description of the open cards to the selected provider

and returns one suggested next step. Merely opening the board does not make that request.

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## 6. Create projects and configure workflows

Choose **New project** from the menu beside **New** to start a project-oriented structure. The app can create a project record, an outline page, and a task board so that scope, open questions, and next actions have a place to live.

### Start with your own context

Write a short description, constraints, and open questions first. Then use explicit actions such as **Develop idea**, **Create action plan**, or **Ask AI** if you want assistance. You review the resulting plan before treating it as work to do.

### Where cards go next

Each stage in the workflow panel shows an arrow to the stage its cards move to when the agent finishes. Open a stage to choose that destination from any other stage (or "Nowhere" to make it a stopping point). Destinations are saved by stage id, so reordering the board's columns never changes where a workflow sends cards. A stage whose destination was deleted from the property simply stops, rather than guessing.

Press **Diagram** in the workflow panel to draw the saved routing as a flowchart on a new subpage of the board: one shape per stage, an arrow to each stage's destination, solid and labelled "agent" where a stage would actually move cards, dashed where it would not, and terminators where cards stop. It is drawn from the engine's own routing rule, not from a model, so what you see is what a run would do. A stage with branches is drawn as a decision diamond with one labelled arrow per branch and an "otherwise" arrow to its plain destination. The subpage is an ordinary page: edit the diagram, or undo its creation from Activity.

The drawing works the other way too. A diagram drawn from a board carries an **Apply to workflow** button. Rewire the arrows (delete one, drag a shape's handle onto another shape, label an arrow) and press it: a plain arrow becomes the stage's destination, a labelled arrow becomes a branch on the agent's answer with that label (an existing branch of the same label keeps its condition), and a shape with no arrow out becomes a stopping point. The board's stage list stays the authority, so a shape that is not a stage is reported and left out rather than invented, and prompts and other settings are untouched. The change is one Activity entry you can undo.

### Conditions, branches, and actions

Open a stage and its rules sit under the agent settings, in three parts.

**Only when** limits which cards the stage touches. Add a condition such as *Priority is High*, *Owner is not empty*, or *Estimate is more than 5*. Every condition must hold; cards that fail are left alone, and **Preview** counts them as "don't meet the stage's conditions" so you can tell a quiet board from a misconfigured one.

**Branches** send cards to different stages. A branch tests either a card property or *the agent's answer* and names the stage to go to. Branches on the agent's answer read the first word of its reply, so tell the agent in its instructions to start with the word you test for (for example "answer GO or STOP first"). The first matching branch wins; when none match, the card goes to the stage's normal destination. **Preview** shows the destination it can know before the agent runs and says "or where the agent's answer sends it" when a branch depends on the reply. The Activity entry for the move names the branch that was taken.

**After the card moves** lists actions that run in order once the card has moved (or once you approve its proposal):

- **Set a property** on the card, such as Priority to Medium or Reviewed to checked.
- **Create a page** next to the board, titled from a template, with the agent's output as its body.
- **Append to a page** you choose, such as a decisions log, under a heading naming the card.
- **Notify me**, which adds an Inbox item so it is waiting for you even if the app was closed when the workflow ran.

Text fields accept `{title}`, `{from_stage}`, `{to_stage}`, `{output}`, `{board}`, and `{date}`. Each action has its own on/off switch, and each one you can undo on its own from Activity: undoing "set a property" puts the old value back and leaves the move, the created page, and the rest in place. An action that fails, for instance because the page it appends to was deleted, is logged and the other actions still run.

### Configure automation carefully

Workflow automation is optional. A workflow can be manual, run when a card enters a configured stage, or run on a configured interval. When a trigger is enabled, it can run without an open window and may send the configured card context to the selected AI provider.

Before enabling a trigger:

1. Read the workflow prompt and confirm the context it can use.
2. Start with a small, non-sensitive test board.
3. Check **Activity** after a run.
4. Keep undo and recovery options in mind before enabling a recurring trigger.

The app records workflow activity so you can inspect what happened. Do not assume an automation will make good product, legal, financial, or irreversible decisions for you.

### See the whole system in Project Atlas

Choose **Atlas** in the sidebar to zoom out from a single file to the whole workspace: how your files nest, which databases drive workflows, what each AI stage does, and where a human decision is waiting.

Use **Scope** to narrow the map to one project, and the **Overview / Files / Workflow** switch to choose how much of the system to draw. Both are remembered.

Getting around a large map:

- **Focus** (or press `F`) hides the heading and summary cards and gives the whole window to the map. It is remembered between sessions.
- The **minimap** in the bottom-right corner shows the whole graph and a rectangle for where you are. Press or drag anywhere on it to go there.
- **Search** (or press `/`) lists its matches. Pick one and the map moves to it and selects it, rather than only dimming everything else.
- **Arrow keys** move the selection to the nearest node in that direction and bring it into view. `Enter` opens it, `Shift+Enter` opens it beside the current page, `0` fits the whole map, and `Escape` clears the selection or closes the Atlas.
- Drag empty space to pan, scroll to zoom, and use **Fit** to frame everything.

Selecting anything fills the panel on the right with why it is connected, what acts next, and whether a person has to approve something. Double-click a file or task to open it. **3D map** shows the same data as a spatial map using the same scope, view, search, and selection.

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## 7. Use AI deliberately

Open **Settings → AI Providers** to choose a provider. You do not need a paid AI subscription. The first choices shown are:

- **Google Gemini**: the recommended free cloud path. Choose **Create a free Gemini API key**, copy the key from Google AI Studio, and paste it into MindMarshal. The base URL and `gemini-2.5-flash` model are already filled in.
- **Kimi**: sign in with a free Kimi account. No API key is required.
- **Ollama**: run an open model locally. Install Ollama, pull the model named in the setup hint, and keep Ollama running while using AI.

Paid OpenAI and Claude account sign-in and direct OpenAI-compatible or Anthropic API configurations remain available below those free options.

Choose **Save & test connection** on the provider card. This saves the values currently visible and tests those exact values, so there is no separate save-before-test step. A successful test confirms the model replied. If a key or model is missing, the card explains what to add instead of showing a generic “AI not configured” message.

### Direct AI actions

These actions send only when you invoke them:

- **Ask AI** from a selected passage;

- `Ctrl + Enter` to request **Continue writing** at the cursor;
- the microphone button in the formatting toolbar to **Dictate** for up to one minute. On macOS, transcription uses an on-device language model and requires no AI account, API key, internet connection, or Pro entitlement;
- the speaker button to **Read aloud** with the natural ElevenLabs **Chris** male voice. On first use, MindMarshal asks for explicit consent and explains that only the selected text, or the current page title and body when there is no selection, will be sent through MindMarshal's licensed speech service to ElevenLabs. Declining sends nothing. Consent is remembered on that Mac and can be revoked with the **CHRIS** toolbar control. Press the stop button in the speaker's place to end playback. Chris requires an active Pro license or trial and uses a bounded publisher-funded daily allowance. Dictation remains local. The rejected optional Qwen download is not offered, and rejected local TTS models are not bundled in the customer app;
- workspace chat with `⌘ J`;
- **Organize inbox** for captured items;
- explicit project-planning actions;
- daily-note buttons such as **Give me a way in** and **Weekly reflection**;
- **Get an AI suggestion** in a configured board.

### Designed briefs, reports, and charts

In inline **Ask AI** or page chat, ask MindMarshal to create or lay out a **brief**, **report**, **assessment**, or **dashboard**. The result is inserted as native editor content: real headings, tinted summary/decision/risk/action callouts, editable comparison tables, and chart blocks. Markdown pipe rows and ASCII chart lines are converted rather than left scattered through the page.

Charts use numeric evidence present in the selected text, page, or workspace sources. When the material is qualitative, MindMarshal uses a table or callout instead of inventing scores or percentages. Select an inserted chart to change its type, labels, values, palette, legend, or value labels; every other block can be edited with the normal writing tools.

### Credential storage

API keys and supported OAuth or integration tokens use the operating system's own credential store: the Keychain on macOS, and the Credential Manager on Windows. The app does not log those secrets. Keep your computer account protected, and do not paste secrets into notes, chat messages, screenshots, or support requests.

On a platform without an operating-system credential store, the app preserves compatibility with local storage.

### AI workflows

A direct action is not the same as a workflow trigger. A workflow you have explicitly configured to run on an interval or when a card enters a stage can make a later provider request. Turn it off or change the trigger when

you no longer want that behavior.

### Give the AI a goal and watch it work (Run)

**Run** in the sidebar starts a governed run: you state a goal, choose the scope (the current page and its subpages, or the whole workspace), and choose how much autonomy this run gets. The plan is always the same four steps, and the AI never decides whether a write happens; it only produces the content.

- **Plan only** lists the steps. Nothing runs.
- **Propose** reads the scope and drafts the result, then stops at the write step with **Approve and write** and **Reject**. Nothing lands until you approve.
- **Act** runs every step, up to the **write cap** you set for the run.

The rail narrates from what actually happened: the read step names the pages it read and how many were excluded by their AI reach; the draft step names the provider and model; the output step says which shape it chose and why (for example a bar chart because the pages contain a labelled numeric series, or a flowchart because the draft is a sequence of steps). The result lands on a new page under the scope, with native chart and flowchart blocks where the data called for them, and **Open result** takes you there.

While a run waits on you, you can **Edit goal** (the read step is kept, the draft and output are redone under the new goal), **Skip** the write to finish with nothing written, or **Reject** to stop. A run that stops at its write cap offers to raise the cap and continue.

**Undo all** reverses everything the run wrote, newest step first, through the same Undo the Activity feed uses. Every change a run makes is recorded in Activity attributed to that run, not to you. The Activity feed's filter row (**All / You / Runs / Workflows / MCP clients**) narrows the ledger to one source, so "what did the AI change while I was away" is one click. A run obeys AI reach exactly like every other AI feature: *Never* pages are left out of its context, and a *Local only* scope refuses a remote provider before any request is made.

A completed run can be saved as a **routine**: its goal, autonomy, and write cap without its data. Routines appear at the top of the Run panel with **Run here**, which starts the same plan on whatever page is current, so a weekly brief or a standard review becomes one click on a new project. Saving and deleting routines is recorded in Activity and can be undone.

Runs are part of Pro. On Free Core the Run panel stays visible so you can see what it does, but starting one needs a trial or license.

### Let an outside AI assistant read your workspace (MCP)

Pro workspaces can act as a local MCP server, so an assistant you already use, such as Claude Desktop, Claude Code, or Codex, can search and read permitted pages and boards, and can propose new pages or appends that you approve inside MindMarshal. Nothing an outside assistant does changes the workspace directly.

1. Open **Settings → MCP clients**, type a name for the assistant, untick any scope you do not want to grant, and press **Create grant**.

2. Copy the setup shown for your host. The token appears once; only its digest is stored. Press **Done, I saved it** to clear it from the screen.
3. Restart the host (Claude Desktop) or run the one-line command (Claude Code and Codex). The host starts MindMarshal in a background read mode over a local pipe. No network port is opened.

What the assistant can see is decided by each page's **AI reach**. Only pages resolving to *Anywhere* are visible; *Local only* and *Never* pages are reported as missing, not merely refused, so their titles never leave the device. Boards follow their page, and a single card with a stricter reach stays hidden even on a shared board.

Proposals are accepted only while MindMarshal is open, and are capped at 100 per day. Pending proposals appear in two places: the **Run** item in the sidebar badges how many are waiting, and the Run panel lists them at the top with the assistant's name, a **Show content** toggle, and **Accept** / **Reject**. The same proposals appear in **Activity** with the same controls. Accept creates the proposed page (or appends to the named page) and opens it; the landed content gets its own Undo entry like any other creation. Reject writes nothing. Either decision can be undone from Activity, which returns the proposal to pending. Every call an assistant makes, answered or refused, is logged there with the client name, tool, and scope, never the content. Revoke a grant at any time from the same settings pane; the very next call from that assistant is refused.

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## 8. Capture work and connect chat services

### Inbox

Use **Inbox** to collect small ideas before deciding where they belong. You can open it with `⌘ ⇧ I`. When available on your system, the global quick-capture shortcut is `⌘ ⇧ Space`; another application may reserve that shortcut, so use the sidebar if it does not respond.

With a configured AI provider, **Organize inbox** can classify captures into Tasks, Projects, Ideas, or the Journal. This is an explicit AI action. Review the result and use the available undo control if a capture was filed in the wrong place.

### Slack, Discord, and GitHub

Set up capture-in integrations in **Settings → Integrations**. Only connect an account, bot, or repository token that you are authorized to use.

- For Slack, follow Slack's own app and permission setup requirements.
- For Discord, use a bot invited to a server that you manage or are authorized

to access. Do not use a personal Discord token.

- For GitHub, create a fine-grained personal access token for only the

repositories you want to capture. Grant read-only repository metadata, Issues, and Pull requests access. MindMarshal validates it with `GET /user`, stores it in the operating system credential store, and never sends it

back to the UI.

- Choose the channels or repositories you want to subscribe to. Imported chat

messages and assigned open GitHub issues or pull requests are captured into the Inbox. The app does not post replies or write back through these integrations.

After you subscribe a channel or repository, **Check connected sources** defaults to **Every 15 minutes**. Set it to **Only when I press Sync now** if you want manual capture only. Disconnecting an integration stops its configured connection and removes its saved local integration state.

### Google Drive selected-file links

In builds configured with Google Drive support, **Settings → Integrations** can connect selected Google Drive files as local links. This is a selected-file link connector, not whole-Drive sync and not a workspace import yet.

- Choose files in Google's system-browser Picker. The flow requests exactly the `drive.file` scope and does not combine Drive access with Gmail scopes.
- MindMarshal stores OAuth access and refresh tokens in the operating system credential store, with a local SQLite fallback when that store cannot accept or return the credential. Tokens never return to the UI.
- Local metadata can include the selected file ID, name, MIME type, modified time, web link, size when Google supplies it, trashed/check/error state, and optional Google account display name, email, or permission ID.
- Refresh is explicit. Press the Drive refresh control when you want MindMarshal to re-check selected files. Drive links are not part of the Slack, Discord, and GitHub 15-minute capture schedule.
- MindMarshal uses Drive `GET` requests only. It never uploads, edits, moves, deletes, shares, or organizes Drive files. Removing a link only removes local metadata. Disconnecting Google Drive removes credentials but keeps local links usable as web links.

Gmail is still planned. It is not implemented for public shipping because Google's restricted Gmail scopes require additional verification.

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## 9. Use Today, Home, Activity, and Trash

### Today

Choose **Today** to open or create the daily note for the current date. The view can recap captures, completed work, and recorded workflow activity for the day.

### Home calendar

On macOS, the Home page can show events from calendars that already exist on your Mac. Choose **Show my calendar** to ask macOS for permission. If you allow it, the app reads today's event titles, times, locations, and calendar names locally to show them on Home. It does not request calendar credentials or upload calendar data to the publisher or another service.

You can decline the request or later revoke it in **System Settings → Privacy & Security → Calendars**. The rest of the app remains available without calendar access.

### Activity

**Activity** records actions such as workflow runs. Use it to inspect the history and undo an eligible action if the app offers an undo control. It is a safety net, not a substitute for reviewing an automation before you enable it.

### Trash

Deleted pages go to **Trash** first, where you can restore them. You can enable **Confirm before deleting pages** in **Settings → General** if you want a confirmation step.

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## 10. Search and useful shortcuts

Press ⌘ K to search page titles and content or run common actions. The command palette can create a page or database, capture work into Inbox, open a daily note, and change theme.

Common macOS shortcuts:

| Shortcut | Action |
| --- | --- |
| ⌘ K | Search and command palette |
| ⌘ N | New page |
| ⌘ ⇧ N | New database |
| ⌘ ⇧ I | Inbox |
| ⌘ J | AI chat |
| ⌘ ⇧ Space | Global quick capture, if available |
| ⌘ + , ⌘ − , ⌘ 0 | Zoom in, zoom out, reset zoom |
| Esc | Close a modal or menu |
| / | Open the editor block menu |
| [[ | Link another page |
| Ctrl + Enter | Explicitly request Continue writing |

Keyboard shortcuts can conflict with other apps or macOS utilities. When one does not work, use the visible sidebar or menu action instead.

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## 11. Back up and restore your workspace

Encrypted backups are built into the app. Open **Settings → Backup**.

### Create an encrypted backup

1. Choose **Create a backup**.
2. Enter and repeat a passphrase with at least eight characters.
3. Choose a save location for the `.mmbackup` file.
4. Store the passphrase separately from the backup file.

The backup is encrypted. Nobody can open it without the passphrase, including the app publisher. The passphrase is not stored in Settings or written to logs. If you lose it, the backup cannot be recovered.

You can store an encrypted backup in a cloud drive or on removable storage, but still protect the passphrase and keep more than one copy of important work.

### Schedule encrypted backups

1. Open **Settings → Backup** and find **Scheduled encrypted backups**.
2. Choose a folder. Cloud folders and removable drives are fine, but the status will say plainly when the destination is unavailable and the app has to retry.
3. Enter and repeat a passphrase with at least eight characters.
4. Choose **Daily** or **Weekly**, then choose how many encrypted backups to keep from 1 to 90. The default is 7.
5. Choose **Set up scheduled backup**.

The frontend never stores the scheduled-backup passphrase. It is sent only to the native secure configuration command. Canceling the folder chooser or leaving the form does not change an existing schedule. After setup, the panel shows whether scheduled backups are on, the folder, cadence, retention count, last attempt, last success, any last error, and the next planned run. You can choose **Run now** for an immediate encrypted backup or **Disable…** to turn the schedule off after confirmation. Existing backup files are kept when scheduling is disabled.

### Restore an encrypted backup

1. Open **Settings → Backup**.
2. Choose **Restore from a backup**.
3. Enter the passphrase for that backup.
4. Choose the `.mmbackup` file. MindMarshal decrypts and validates it locally, then shows a side-by-side preview of its pages, databases, rows, size, and latest update against the current workspace. Nothing has been staged yet.
5. If the comparison is the backup you intended, choose **Use this backup**. MindMarshal validates the same file again and refuses it if the bytes changed after preview.
6. Quit and reopen the app to load the restored workspace.

A restore replaces the current workspace on the next launch. The app keeps the workspace being replaced, including its SQLite recovery sidecars, under one unique `.replaced-…` name. A durable recovery journal resumes or safely retries an interrupted adoption or migration instead of guessing. You should still verify the preview before confirming.

Canceling the file chooser, canceling the preview, using a wrong passphrase, or selecting a damaged, incomplete, or newer-format backup does not create a pending restore and does not alter the current workspace.

### Manual copy

You can also quit the app and copy the database file manually. A plain database copy is not encrypted, so treat it like a full copy of your notes.

# 12. Move notes in and out

Your work is not locked in this app. You can bring an existing workspace in, and you can take any page out as a plain text file at any time.

### Import from Notion, Obsidian, or Evernote

1. In the sidebar, choose the caret next to **New**, then **Import…**.
2. Pick the `.zip` the other tool gave you, or cancel that dialog to pick an export **folder** instead. Obsidian vaults are usually a folder already.
3. The app reports how many pages and folders it created.

Folder structure is preserved: a folder becomes a page, and the files inside it become its children.

A few tidy-ups happen automatically:

- Notion adds a long identifier to every file name. Those are removed, so you get "Project Plan" rather than "Project Plan 1a2b3c4d…". Titles that genuinely end in a number, like "Budget 2026", are left alone.
- Notion also repeats the page title at the top of each file. The duplicate is removed, because the page already has that title.
- Obsidian `[[wiki links]]` become ordinary text, keeping the words you chose to display.
- Tool folders such as `.obsidian` and attachment folders such as `_resources` are not imported as notes.

Headings, lists, to-do items (including which are ticked), quotes, code blocks and tables all come across as real blocks, not as plain text.

Images and other attachments are not imported yet. The notes that referenced them still arrive; the files themselves stay where the other tool put them.

### Export your work

Use the **Export** button in the page bar. The choices depend on what you are viewing:

- A document page can be saved as a **Word ( `.docx` )**, **PDF ( `.pdf` )**, or ordinary **Markdown ( `.md` )** file.
- A database can be saved as an **Excel ( `.xlsx` )** workbook or **PDF ( `.pdf` )**. Both database formats use the active filters, sorting, and grouping while keeping every visible schema column.

Word export preserves useful document structure such as headings, lists, task state, quotes, code, and tables. Content with no direct Word equivalent is written in a readable form rather than silently dropped.

Excel export keeps numbers and checkboxes typed, uses the names of select options and related rows instead of internal identifiers, and includes computed formula and rollup results. The header row is frozen and filterable.

PDF export works completely offline and creates paginated A4 documents that can be opened by an ordinary PDF reader. Page PDFs retain headings, lists, task state, quotes, code, tables, embedded images, and rendered charts when those images are available. Database PDFs include the active view's grouped rows, human-readable relation names, formulas, and rollups. Equations or media that cannot be embedded are represented by readable text rather than silently dropped. The bundled font covers common Latin, Greek, and Cyrillic text; characters outside its coverage are shown as `?` markers.

File export uses the desktop app's native save dialog. The browser preview shows the controls honestly but does not pretend it can create a file on your computer. In the browser preview, Markdown can be copied to the clipboard.

You can still use the sidebar page ⋯ menu to export a document as Markdown. Charts have no Markdown equivalent, so they are written as a small table of their underlying numbers rather than dropped.

Every export format keeps working if your licence lapses. Being able to leave with your work is not a paid feature.

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## 13. Understand local data and updates

### Local data location

The workspace database is named `mindmarshal.db`.

| Platform | Default database path |
|---|---|
| macOS | `~/Library/Application Support/com.mindmarshal.app/mindmarshal.db` |
| Windows | `%APPDATA%\com.mindmarshal.app\mindmarshal.db` |
| Linux | `~/.local/share/com.mindmarshal.app/mindmarshal.db` |

Removing the app bundle itself may not remove its application data. Make an encrypted backup before manually changing or removing the data directory.

### Move to another computer

The safest route is an encrypted backup and restore. Install the app on the new computer, then use **Settings → Backup → Restore from a backup**. Avoid copying secret credentials or credential-store data manually.

### Software updates

Signed public builds can show **Software updates** in **Settings → General**. After the app has been idle for ten seconds, it can quietly check the fixed HTTPS update feed once. You can also use **Check for updates** when available. The check retrieves public release metadata, not workspace content. If an update is available, the app shows a notice and downloads or installs it only after you choose to do so. The updater verifies the signed

update metadata before installing an update and restarting the app. Read the matching release notes before upgrading important work.

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## 14. Troubleshoot safely

### The app does not open normally

Confirm that the download came from the official release site and that the version matches the published release notes. Do not disable macOS security features or run a command copied from an untrusted source. Contact the published support channel with the app version and the exact visible error text.

### An AI action fails

Open **Settings → AI Providers** and check:

1. a provider and model are selected;
2. the account sign-in or API key is valid;
3. **Save & test connection** succeeds;
4. the selected provider is reachable from your network.

Do not send your API key, OAuth callback, access token, or raw workspace content to support.

### A chat integration does not import messages

Verify that the integration is connected, that the intended channel is subscribed, and that its permissions are sufficient. Check **Check for new messages** to see whether scheduled capture is enabled or manual-only mode is selected. Use **Sync now** for a direct test.

### A calendar is missing from Home

Confirm that you selected **Show my calendar** and approved macOS calendar access. Check **System Settings → Privacy & Security → Calendars**. The app does not need calendar access for any other feature.

### A backup will not restore

Make sure you chose the correct `.mmbackup` file and entered the exact passphrase. The passphrase cannot be recovered. Do not upload the backup or passphrase to a support ticket.

### What support can safely use

If a public support address is listed on the release site, include only:

- the app version and macOS version;

- a short description of the visible behavior;
- the exact non-secret error message;
- steps that reproduce the issue.

Never include an API key, OAuth token, backup passphrase, license key, raw database, full backup file, or private workspace content unless you have an explicit secure process that you trust.

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## Visual design blocks

Use `/visual design` to add a Free Core canvas for quick Canva-like assets. The block includes templates for **Logo**, **Square post**, **Story**, **Landscape post**, and **Presentation slide**. Each block is one design, so duplicate a block for variations or use **Add slide** to extend a presentation.

The canvas and inspector are separated so sliders and fields never drag the whole design. Tools are organized into Template, Text, Colors, Graphics, Arrange, and Export panels. Choose independent title and subtitle fonts, weights, italics, alignment, custom hex colors, theme palettes, graphics, graphic styles, decorative shapes, and background patterns.

Click the Title, Subtitle, Graphic, or Shape layer before arranging it. Drag an object directly on the canvas, use arrow keys to nudge it by one canvas unit, or use `Shift` plus an arrow key to move it by ten. The Arrange panel adds size, rotation, opacity, directional movement, centering, and a safe **Reset all objects** action without discarding the chosen colors or graphics.

Use **Duplicate design** to copy any design. A presentation design also offers **Add slide**, which creates the next editable slide block. Use **Export SVG** / **Export PNG** to download artwork for social channels, the browser, PowerPoint, Keynote, or another design tool. MindMarshal does not currently claim native `.pptx` export or full Canva parity; the editor is a practical, local Free Core workspace rather than a replacement for every specialist design feature.