

Memoir.ai — Onboarding & Support Documentation Pack

User Activation, Guidance, and Support Operations

Document Version: 1.0

Status: Operational Reference

Owner: Customer Experience & Support

Last Updated: YYYY-MM-DD

1. Purpose

This documentation pack defines onboarding flows, activation guidance, and customer support procedures for Memoir.ai. It ensures users can successfully install, configure, and operate the platform while support teams maintain consistent, privacy-safe assistance practices.

2. Scope

This pack covers:

- First-run onboarding experience
- Vault creation guidance
- First data import workflows
- Feature discovery sequences
- User education checkpoints
- Support escalation procedures

- Troubleshooting guidance
- Privacy-safe support practices

Internal engineering operations are excluded.

3. Onboarding Philosophy

Onboarding must:

- Build user confidence quickly.
- Reinforce privacy and ownership principles.
- Demonstrate value early.
- Reduce friction in importing data.
- Maintain calm, minimal guidance without overwhelming users.

The user must feel safe and in control throughout setup.

4. First Launch Experience

On first launch, the system must guide users through:

1. Welcome introduction
2. Privacy pledge confirmation
3. Vault creation
4. Initial import guidance

5. Feature orientation

The onboarding flow must be dismissible and resumable.

5. Vault Creation Guidance

Steps shown to users:

1. Choose vault location.
2. Create strong passphrase.
3. Confirm passphrase.
4. Complete vault initialization.

Warnings must clarify:

- Passphrase recovery is impossible.
- Data loss occurs if passphrase is lost.

6. First Import Guidance

Users are guided to import their first archive.

Support steps include:

- Selecting source type.
- Locating export files.

- Starting import.
- Viewing progress indicators.
- Confirming completion.

Large imports must communicate expected duration.

7. Feature Discovery Flow

After import, users should be guided to:

- Explore the timeline
- Use search functionality
- Generate first snapshot
- Review citation linking
- Edit or export narratives

Feature prompts should appear gradually and never block workflows.

8. Snapshot Education

Users must understand:

- Snapshots summarize history segments.
- Citations allow verification.

- Narratives remain editable.
- Versions are preserved.

Prompts encourage editing and regeneration exploration.

9. Ongoing Guidance Prompts

Contextual hints may appear when users:

- Complete imports
- Use search features
- Generate snapshots
- Access export features

Hints should disappear once used or dismissed.

10. Support Operations Principles

Support teams must:

- Respect user privacy.
- Never request vault passphrases.
- Avoid requesting raw vault content.
- Use sanitized diagnostics only.

User data ownership remains absolute.

11. Support Workflow

Standard support handling:

1. Collect issue description.
2. Request application version.
3. Request reproduction steps.
4. Review sanitized diagnostics.
5. Provide solution or workaround.
6. Escalate if unresolved.

12. Troubleshooting Reference

Common user issues:

Import slow or stalled:

- Confirm archive integrity.
- Verify system resources.

Vault fails to unlock:

- Confirm correct passphrase.

- Verify vault location.

Search slow:

- Wait for indexing completion.

AI snapshot inaccurate:

- Recommend regeneration or correction.

13. Escalation Process

Escalate issues when:

- Vault corruption occurs.
- Data import repeatedly fails.
- Snapshot generation crashes.
- Application fails to launch.

Escalations must include logs and reproduction steps.

14. Privacy-Safe Diagnostics

Allowed diagnostic data:

- App version

- OS version
- Error codes
- Performance metrics

Forbidden data collection:

- Messages
- Media files
- Contact names
- Private narratives

15. User Education Best Practices

Encourage users to:

- Export backups regularly.
- Store passphrase securely.
- Import archives periodically.
- Review generated narratives.

Education should empower users, not overwhelm them.

16. Support Communication Guidelines

Support messaging must:

- Be empathetic and clear.
- Avoid technical jargon.
- Provide actionable next steps.
- Avoid blame.

Communication tone should reassure users.

17. Documentation Maintenance

This pack must be updated when:

- New onboarding steps appear.
- Feature flows change.
- Support patterns evolve.
- Privacy safeguards are updated.

Regular review ensures alignment with product changes.

18. Conclusion

This onboarding and support documentation ensures users successfully activate Memoir.ai while maintaining strict privacy guarantees. Proper onboarding builds trust, and effective support sustains long-term user confidence.

