Awesome — here's the **Mina New-User Handbook**: a single, crystal-clear, step-by-step guide that explains **exactly** how Mina works, what you'll **see**, what you'll **do**, and what **happens next**. It's written for someone brand new who wants to feel confident and in control from minute one.

Important: **No debug logs are ever shown in Mina's user interface.** Technical diagnostics live **only** in the Admin Dashboard (admins only).

Mina — New-User Handbook (Complete, Step-by-Step)

1) What Mina is (in one minute)

Mina is a **Meeting Intelligence Platform**. It:

- **Captures** your meetings (live or uploaded) and turns speech into a clean, searchable **transcript**.
- **Organizes** what matters into instant **summaries** and **tasks** (with owners and dates).
- **Guides** you via an **AI Copilot** (a separate chat tab) that can answer questions about any meeting, find decisions, list tasks, and even help you act (mark done, add to calendar, export to Slack/Notion, etc.).
- **Protects** your data with privacy-first defaults (redaction on shared links is ON by default; quiet hours are ON by default).

You always leave a meeting with **clarity**: what was said, what was decided, what's risky, and what needs doing.

---

2) 3-Minute Quickstart (your first success)

Step 1: Create your account

1. Click **Try Mina Free**.
2. Sign up with **Google**, **Microsoft**, or **Email** (one-tap verification if email).
3. Read the short privacy pledge ("**Your data is yours.**").

You'll see: a short setup screen (language/timezone auto-detected, **Redaction ON**, **Quiet Hours ON** by default).

Step 2: (Optional) Connect your tools

- **Calendar** (Google/Outlook): titles and attendees pre-fill; one-tap add-to-calendar later.
- **Slack**: get daily/weekly digests or task alerts where you already work.
- **Notion/Jira/Trello/Drive/SharePoint**: one-click exports later.

You'll see: a skippable 45-second mini-tour (Record → Transcript → Summary → Tasks → Share → Copilot).

Step 3: Record something (or upload a clip)

- Press **Record** (big button) and speak for 15–30 seconds **or** upload an audio file.
- **Live transcript** will start flowing like a chat.

You'll see:

- "**Recording**" pill and a small audio meter (reassurance it's working).
- **Transcript** lines appearing with your name (or "Speaker 1") and timestamps.

Step 4: End → Get summary & tasks

- Click **End**. Within moments:
    - **Snapshot** summary (2–3 lines) appears.
    - **Tasks** auto-extracted (e.g., "Prepare slides by Monday").
    - Button: **Add to Calendar?** (one tap).
    - Button: **Share Meeting Page** (redaction ON by default, 7-day expiry).

Done: You just saw Mina's full loop in under 3 minutes.

---

3) The Dashboard (your home base)

When you log in, you start here.

Top area (Today)

- Your meetings for **today** (if you connected a calendar).
- Each entry shows time, title, attendees, and a **Record now** button.
- No calendar? You still see the **Record** button for ad-hoc capture.

Middle area (Needs follow-up)

- Cards for **unclosed decisions**, **overdue tasks**, **recurring risks**.
- Click a card to jump straight to the relevant meetings or tasks.

Primary action

- A big **Record** button: always visible, always one tap away.

Why it matters: You always know what's next and can start capturing instantly.

---

4) Recording & Permissions (what to expect)

- **Start Recording:** Click **Record**. You may get a browser mic permission prompt; click **Allow**.
- **While recording:** A subtle "Recording" pill shows at the top; a small audio meter moves as you speak.
- **Pause:** Click **Pause** any time (e.g., for private moments). A banner reads: "**Recording paused.**" Click again to resume.
- **Offline:** If your connection drops, Mina shows: "**You're offline — still capturing. We'll sync when you're back.**" You won't lose your notes.
- **Stop:** Click **End**. You'll land on the meeting's page with transcript, summary, and tasks ready.

Tip: You can rename speakers after the meeting; don't stress during the call.

---

5) Live Transcript (during the meeting)

What you see:

- A calm, **chat-style transcript**: each line has **speaker** + **timestamp**.
- **Speaker labels:** Mina guesses based on past context; unknown speakers show as "Speaker 2," etc.
- **Confidence cues:** Low-confidence words are lightly underlined with a tooltip "Low confidence — review later."
- **Overlapping speech:** Lines are stacked clearly; nothing is lost or merged confusingly.

What you do (optional):

- **Rename a speaker:** Click the name (e.g., "Speaker 2") → type "Robin" → **Save**. All past lines update too.
- **Mark a key moment:** Type `/decision`, `/todo`, or `/risk` in the tiny command bar **or** click the matching marker button. A small **chip** appears in the margin and on the timeline.

Why it matters: You stay focused on the conversation while Mina quietly keeps the record clean and navigable.

---

6) Markers & Key Moments (capturing the good stuff)

What markers do:

- **/decision**: flags a decision as it happens.
- **/todo**: creates a draft action item at that exact second.
- **/risk**: highlights something risky or uncertain.

Where they show:

- As **chips** in the transcript margin (hover to preview).
- On the bottom **timeline** so you can jump around quickly.

After the meeting:

- Decisions appear in summaries.
- To-dos become **tasks** with suggested owners/dates.
- Risks show up in **Insights** ("Recurring risks this month").

Why it matters: You won't dig for critical moments; they'll find you later.

---

7) After the Meeting (review screen)

When you click **End**, Mina finishes the transcript and lands you on a **meeting page** with three main parts:

A) Transcript pane (left)

- **Search bar** at the top: type a word (e.g., "budget") → see hits with context lines and timestamps.
- Click any line to **jump** to that exact moment.
- **Highlight text** to open a mini-menu:
  - **Create Task**
  - **Add to Summary**
  - **Copy link** (with a timestamped URL to this moment)

B) Summary pane (center)

- **Tabs** at the top:
    - **Snapshot**: a 2–3 line TL;DR (great for Slack).
    - **Executive**: 5 clean bullets (great for leadership).
    - **Structured**: organized sections — **Decisions**, **Risks**, **Actions**, **Questions**.
- **Tone** dropdown: **Formal / Casual / Technical** (your choice sticks next time).
- Each bullet has a **"View in transcript"** link.

C) Tasks pane (right)

- List of **auto-extracted tasks** at the top:
    - Titles are short and clear (Mina rewrites them).
    - Suggested **Owner** (speaker/host/mentioned person).
    - Suggested **Due date** (if one was said; Mina confirms ambiguous dates, e.g., "This Fri or next Fri?").
- **Buttons** on each task: **Accept**, **Edit**, **Reassign**, **Delete**, **Mark done**.
- You can create **new tasks** from any transcript highlight.

One-tap Calendar prompt

- If Mina detects a date/time: "**Add to Calendar?**" Click **Yes** → it appears in Google/Outlook with a link back to Mina.

Share recap

- Click **Share Meeting Page** → defaults: **Redaction ON**, **Link expires in 7 days**, **Watermark Off** (toggle if you want).
- **Export** as **PDF / Word / Markdown** (with optional workspace branding).

Why it matters: You leave with a complete, polished package you can use instantly.

---

8) Tasks & Workflow (from talk → action → done)

Creating tasks

- **Automatically:** Mina hears "We'll send the report Friday" → creates **Send the report** (Due Fri 5pm; Owner: suggested).
- **Manually from text:** highlight → **Create Task** (Mina pre-fills a short, clear title; you adjust owner/date).
- **From Copilot:** "Create a task to 'Draft Q3 memo by Tue 4pm for Robin'" → it appears; you can mark done or add to calendar right there.

Editing tasks

- Short, action-first titles only (Mina helps rewrite).
- Owners suggested; reassign via dropdown.
- Dates captured (human phrases like "next Tuesday morning" are understood).

Views that keep you sane

- **My Tasks**: due **Today**, **This Week**, **Later**; mark done, snooze, or delegate in one click.
- **By Meeting**: tasks grouped under each meeting (with a peek of the summary).
- **Kanban**: drag tasks across **Draft → Review → Approve**; link dependencies if needed (Draft depends on receiving data, etc.).

Calendar sync

- Add any task to your calendar in one click; edits in your calendar reflect back in Mina.
- **Overlay** view in Mina to see meetings + tasks together in a single schedule.

Why it matters: Action items don't get lost. Everything ties back to evidence (the transcript moment).

---

9) Calendar & Scheduling (lightweight, powerful)

- When Mina detects a deadline, it **offers** to add it to your calendar; no hunting around.
- **Two-way sync** keeps things aligned (update in Calendar = seen in Mina).
- **Nudges** appear before due dates — never during your quiet hours.

Why it matters: Deadlines become real. You don't live in your inbox to track them.

---

10) Collaboration & Sharing (safe by default)

Meeting page (what recipients see)

- Clean, read-only web page with **title**, **summary tabs**, **tasks**, and **transcript** (sensitive data **redacted by default**).
- External guests cannot edit your content unless you explicitly grant permissions.

Share settings (simple & safe)

- **Redaction ON** by default (emails, phone numbers, IDs masked).
- **Link expiry** defaults to **7 days** (change to 30/90 if needed).
- **Watermark** optional (add when sharing broadly).

Export options

- **PDF** (polished, client-ready), **Word** (editable), **Markdown** (for wikis).
- Each export embeds links back to the exact moments in Mina.

Comments & mentions

- Highlight a line → **Comment** → "@Robin can you confirm the final number?"
- Robin gets a Slack/email ping (your choice).

Why it matters: You share quickly with **confidence** that private details won't leak.

---

11) Insights & Trends (your team's bigger picture)

What you'll see

- **Recurring risks** (e.g., "Budget delays" — 3 mentions this month).
- **Decision aging** (decisions still open > X days).
- **Unresolved actions** (grouped by owner, meeting, or project).
- **Talk-time balance** (helpful in retrospectives and 1:1s).

What you can do

- Click a card → see excerpts across meetings with links.
- **Assign owners**, **set dates**, **schedule follow-ups** from the insight card.

Optional weekly insight report

- One click to generate a **Weekly Insights** mini-report:
  - Highlights
  - Risks to watch
  - Stalled decisions
  - Suggested follow-ups

Why it matters: You don't just remember one meeting — Mina helps you learn across **all** of them.

---

12) AI Copilot (separate "Copilot" chat tab)

A dedicated chat tab where you can ask Mina **anything** about your meetings, summaries, tasks, and trends — and **act** on the answers.

Where to find it

- Top navigation: click **Copilot**.

What you do

- Type natural questions, like:
    - "What did we decide about the Q3 budget last Thursday?"
    - "Summarize the last 3 client calls in 5 bullets."
    - "What are my overdue tasks from design reviews?"
    - "Delete the task 'Old intro email draft'."
    - "What risks came up most often in September?"
    - "What did Robin commit to last week?"
    - "What's due Friday?"

What you see

- **Direct answer** + **citations** (links to transcript lines, tasks, or meetings).
- **Action buttons** in the reply:
    - **View in transcript**
    - **Create/Mark done/Delete task** (Copilot will confirm deletions)
    - **Add to calendar**
    - **Export to Slack/Notion/Jira**
- **Confidence indicator** when an answer touches ambiguous areas (and a link to verify).

Scope & safety

- Copilot respects your permissions:
    - You see your meetings and anything shared with you.
    - Admins (if permitted) can run workspace-wide queries.
- Copilot **always cites** sources; it won't "guess" without evidence.
- You can **limit** Copilot's ability to create/edit/delete tasks in **Settings**.

Why it matters: It's like having a smart assistant who remembers **everything** you've discussed and helps you act — right from chat.

---

13) Mobile (Mina in your pocket)

- Bottom tabs: **Dashboard • Meetings • Tasks • Copilot • Settings**.

- **Record** with one big button; live transcript flows smoothly.
- **Markers** are large chips (easy to tap).
- **Offline capture** works; syncs when online.
- Swipe tasks to **Mark done** or **Snooze**.
- Ask Copilot quick questions: "What's due today?"; tap to add to calendar.

Why it matters: Full power, anywhere.

---

14) Notifications & Digests (useful, not noisy)

Channels

- **Slack**, **Email**, or **Push** (you choose).

Instant alerts (you can toggle each)

- When you are **assigned** a task.
- When you are **@mentioned** in a comment.
- When a task is **due soon** or **overdue**.
- When a **summary** is ready (for meetings you own).

Bundled digests

- **Daily (9am by default):** Due today, overdue, unclosed decisions, top risk.
- **Weekly (Mon 9am):** Week-ahead plan + top insights.
- Optional **Team digest** to a Slack channel (high-level, no PII).

Quiet Hours

- Default ON (evenings/weekends) so alerts arrive when you want them.

Why it matters: You stay on top of what matters without feeling interrupted.

---

15) Settings (clear, safe, reversible)

Open **Settings** from the top nav. Everything is plain English; nothing is buried.

Profile

- Name, photo, title, **display name** for transcripts.

- Timezone, language, date format.
- **Pronunciation hints** (helps speaker labels).

Security

- **2FA** (app/SMS/email).
- **Active devices** list; **Log out everywhere**.
- New device alerts (toggle).

Privacy

- **Retention** sliders for **Transcripts**, **Audio**, **Exports** (e.g., 30/90 days).
- **Download my data** (self-service export).
- Delete a meeting (with **Undo**); Delete account (with a grace period).
- **Automatic redaction** rules ON by default (emails, phone numbers, IDs).
   Add custom patterns with a live preview.

Workspace & Team (Admins)

- Invite by email/link; roles:
  - **Owner**: Everything.
  - **Admin**: People, workspace settings, billing.
  - **Editor**: Create/edit content.
  - **Viewer**: Read-only.
- **Groups** (e.g., Sales, Design) to share or notify at once.
- Defaults: redaction ON, link expiry (7/30/90 days), retention (e.g., 90 days).
- **Enterprise**: Enforce SSO, restrict external domains.

Integrations

- **Calendar** (Google/Outlook) — connect/test/disconnect.
- **Slack** — choose your DM or channel for digests/alerts.
- **Notion, Jira, Trello, Drive/SharePoint** — toggles; pick where to send exports.
- **Health status** and reconnect reminders.
- Clear "What Mina can access" text — no surprises.

Notifications

- Choose **channels** (Email/Slack/Push).
- Choose **timing** (Instant/Daily/Weekly).
- Set **Quiet Hours** (default ON).
- Toggle what triggers alerts (assigned, mentions, due soon, overdue, digests only).

Transcription Defaults

- Preferred **language** (auto-detect toggle).
- **Speaker separation** ON/OFF.
- **Confidence highlighting** (Off/Light/Strong).
- Customize quick commands (`/decision`, `/risk`, `/todo`).
- Meeting **title template** (e.g., `{Date} — {Topic}`).

Sharing & Export

- Default export format (**PDF/Word/Markdown**).
- Branding (logo, footer, accent color).
- Guest **link expiry** (7/30/90 days).
- **Watermark** (optional).
- **Redaction ON** by default for shared links.

Billing (Admins/Owners)

- Plan, **usage meters** (minutes, tasks, storage).
- **Alerts** at 80/95/100%.
- Payment methods, **invoice** history, tax/VAT fields.

Compliance & Audit (Admins)

- **Audit timeline** (who viewed/shared/exported; key setting changes).
- **Data region** preference (EU/UK/US) if offered in your plan.
- **Discovery export** by date/user/keyword.
- DPA access link.

Admin Dashboard (Admins only)

- Workspace **health**, usage trends, integration status.
- Policy management (retention, sharing, redaction).
- **Diagnostic logs live here only** — never in the main UI.

Copilot Settings

- Default **scope**: Personal vs Workspace (admins only).
- **Task controls**: allow/deny AI to create/edit/delete tasks (per user).
- **Export controls**: where AI is allowed to send/export (Slack/Email/Notion).
- **Always show citations** (admins can enforce).

---

16) Admin Guide (workspace owners & admins)

Setup

1. Create a **workspace**; optionally add branding (logo, color).
2. **Invite** users; assign **roles**.
3. Set **defaults**: redaction ON, link expiry 7 days, retention 90 days, quiet hours ON.

Governance

- Enforce **SSO** (Enterprise).
- Restrict external shares to **allow-listed domains**.
- Select a **data region** (if available in your plan).
- Control **Copilot** permissions (task edits, export destinations).

Visibility & control

- Check **usage** trends (minutes, active users).
- Review **audit logs** weekly for sensitive meetings.
- Ensure **integrations** are healthy (reconnect expired tokens).

Billing

- Monitor usage vs plan; set alerts to billing contacts.
- Download **invoices**; update payment details.

Offboarding

- Disable a user; **transfer** meeting ownership.
- **Export** user's content on request.
- Optionally **archive** the workspace.

---

17) Lifecycle (trial, upgrades, deletion)

- **Trial:** You'll see a usage bar (e.g., 40/60 minutes used). When near limits, Mina suggests upgrading — never interrupts mid-meeting.
- **Upgrade/Downgrade:** No data loss; changes apply immediately.
- **Delete account:** Mina offers a one-click data export first. Confirm deletion → content purged after a **grace period** (e.g., 7–30 days). You can **undo** within that window.
- **Delete workspace (owner):** Checklist prompts reassignments and exports. A final **audit snapshot** may be retained for legal record (no content).
- **Reactivate:** If within grace, your settings/history are restored on sign-in.

---

18) Common "How do I…?" Recipes

- **Get a client-ready recap:** Open the meeting → Summary → **Executive** tab → **Export PDF** → (optional) add branding → Share.
- **Create a task from a sentence:** Highlight sentence → **Create Task** → confirm owner/date → **Add to Calendar** (optional).
- **Share safely with a client: Share Meeting Page** → confirm **Redaction ON** and **Expiry 7 days** → Send link.
- **Catch up on a project:** Open **Insights** → filter by project or client → scan recurring risks & unclosed decisions → assign owners.
- **Plan my week in 2 minutes:** Open **Copilot** → "What's due this week?" → click **Add to Calendar** on important items.

---

19) Troubleshooting (quick fixes)

- **Mic blocked:** Browser asked for mic but you missed it → Click the mic icon in the URL bar → **Allow** → try again. Or upload a file.
- **Speakers mislabeled:** After the meeting, click a name ("Speaker 2") → rename. Past lines update.
- **Poor audio:** Move closer to mic; reduce background noise. Unclear words will be flagged to review.
- **Can't find something:** Use **Search** in the transcript or ask **Copilot** ("Find all mentions of pricing in September.").
- **Too many notifications:** Open **Settings** → **Notifications** → choose **Daily/Weekly** digests and set **Quiet Hours**.
- **Shared link too open:** Make sure **Redaction ON**; set **Expiry** to 7 days; use **Watermark** if needed.

---

20) Accessibility & Inclusion (you can rely on this)

- Full **keyboard** navigation; **skip links** for screen readers.
- **ARIA** labels for all interactive controls.
- **High-contrast** and **dark** modes; respects system **reduced motion**.
- Adjustable text size; content chunked with meaningful headings.
- Clear, jargon-free microcopy.

---

21) Keyboard Shortcuts (power user cheat sheet)

- **Cmd/Ctrl-K:** Global search
- **/** then **decision/todo/risk:** Add marker
- **Cmd/Ctrl-F:** Search within transcript
- **G M / G T / G I / G C:** Go to **Meetings / Tasks / Insights / Copilot**
- **N:** Create new task (from selection)
- **Esc:** Close modals and menus

---

22) Copilot Prompt Ideas (copy/paste to try)

- "What did we decide about pricing on Sept 12?"
- "Top 5 risks mentioned across September, with links."
- "Summarize the last 3 client A calls in 5 bullets."
- "List my overdue tasks; mark 'Send draft deck' as done."
- "Create 'Prep Q3 memo by Tue 4pm for Robin' and add to calendar."
- "What's due this Friday for my team? Group by owner."

---

23) What makes Mina feel premium (the bar we keep)

- **Immediate feedback:** live text in moments; summaries ready when you arrive.
- **Calm visuals:** smooth transitions; no spinners or tech clutter.
- **Respectful defaults:** redaction ON, quiet hours ON, share links expire.
- **Trust on every click:** every bullet and task links to the **exact moment** it was said.
- **Recovery everywhere: Undo**, grace periods, recycle bin for deleted meetings.

Final Thought

If you remember just three things:

1. **Press Record** — Mina handles the rest.
2. After the meeting, check **Summary** and **Tasks** — you'll have your outcomes.
3. When in doubt, ask **Copilot** — it knows your meetings and helps you act.

You're ready. 🎯