

GETTING STARTED GUIDE

From first login to **fully set up** — in minutes.

A walkthrough of the Neuphlo onboarding wizard and a tour of everything in Preferences, so a new workspace is yours, configured, and ready before your coffee gets cold.

§ A guided start, not a blank page

The worst moment in any new tool is the empty screen on first login. Neuphlo replaces it with a short, guided wizard that turns a handful of choices into a working, personalised workspace.

There's nothing to install and no manual to read. After you sign in for the first time, Neuphlo walks you through a few steps — who you are, what to call your workspace, which apps you want, and a workflow to start from — then builds the whole thing for you and drops you straight into a workspace with sample content already in place.



What you'll decide along the way

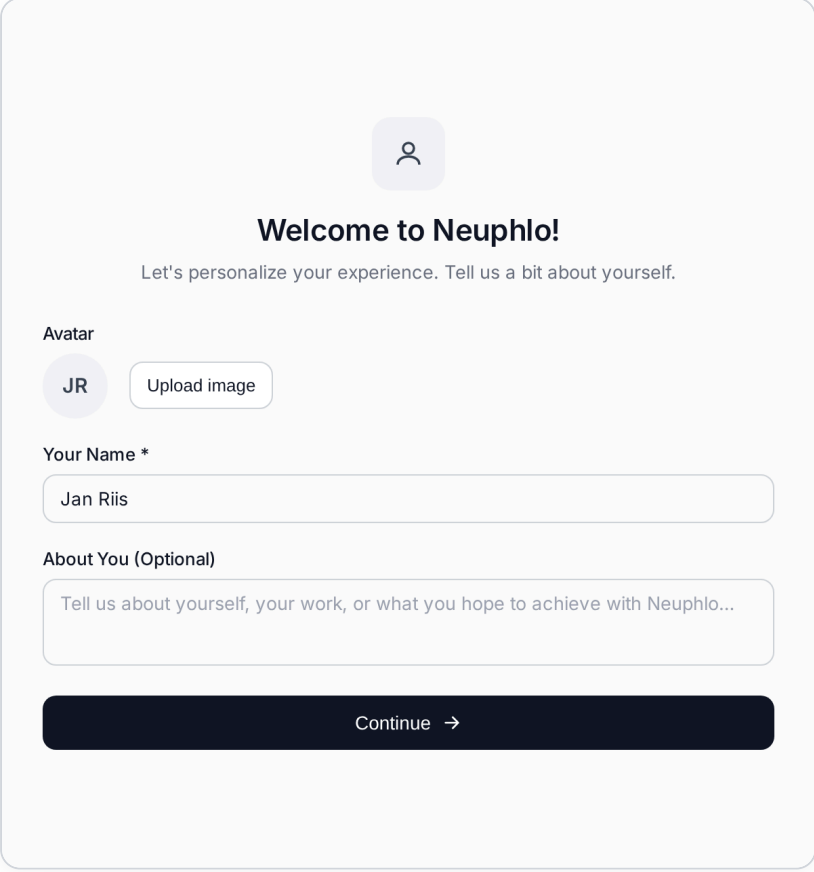
- **Who you are** — your name, avatar and a short bio, so teammates recognise you.
- **Your workspace** — a name and description for your team's central hub.
- **Your apps** — which modules (Tasks, Conversations, Knowledge, Posts, Testing) appear in the sidebar.
- **A workflow template** — a starting set of task types, states and sample content.

The wizard is smart about where to begin: a brand-new user starts at the welcome step, while someone who already has an account (for example, joining via an invitation) skips straight ahead. Every choice here is a starting point, not a commitment — all of it can be changed later in Preferences.

This guide follows the onboarding flow step by step, then tours Preferences — the Account and Workspace settings where you fine-tune everything afterward. The screenshots are taken directly from the product.

§ Step one: who you are

The wizard opens by personalising your account. Add a name (the only required field), optionally upload an avatar, and write a short line about yourself.



The screenshot shows a light gray rounded rectangle containing a user profile icon at the top center. Below the icon, the text reads "Welcome to Neuphlo!" followed by "Let's personalize your experience. Tell us a bit about yourself." The form includes an "Avatar" section with a circular placeholder containing "JR" and an "Upload image" button. Below that is the "Your Name *" field with "Jan Riis" entered. The "About You (Optional)" section has a text area with the placeholder "Tell us about yourself, your work, or what you hope to achieve with Neuphlo...". At the bottom is a dark blue "Continue →" button.

The welcome step. Name, avatar and an optional bio — the minimum needed to make you recognisable to the rest of the workspace.

Next comes a quick check for any pending workspace **invitations** — if a colleague already invited you, you can accept and jump straight into their workspace instead of creating your own. If not, you move on to creating one.

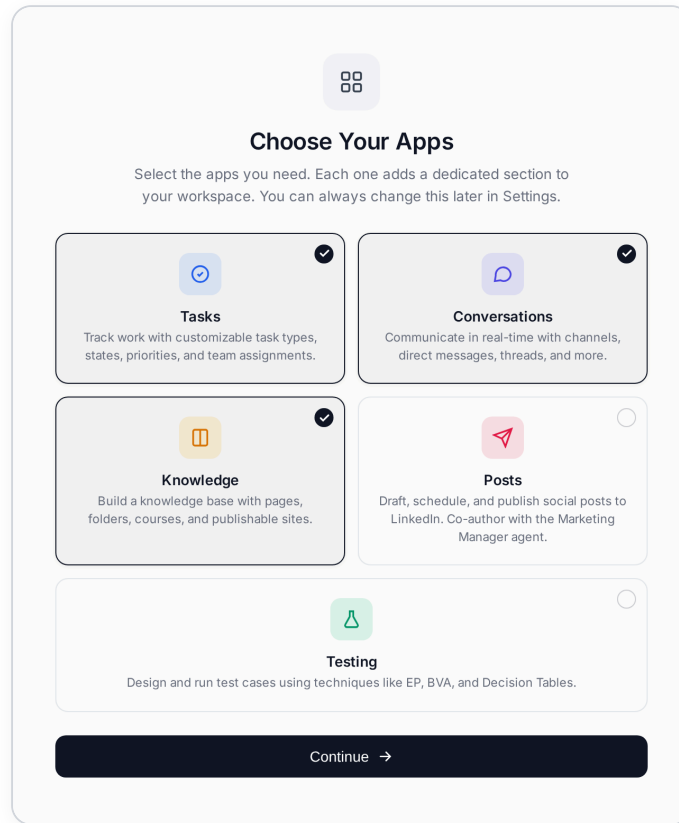
Step two: create your workspace

A workspace is your team's central hub — every task, conversation, document and agent lives inside one. You give it a **name** (for example "Acme Inc" or "Marketing Team") and an optional description. That's the entire decision; everything else about the workspace is configurable later.

Tip: the workspace name is what teammates see in the switcher and in invitations, so pick something they'll recognise. You can rename it any time under Preferences > General.

§ Step three: choose your apps

Neuphlo is modular. Rather than dumping every feature on you at once, it lets you pick the apps you actually need — each one adds a dedicated section to the sidebar.



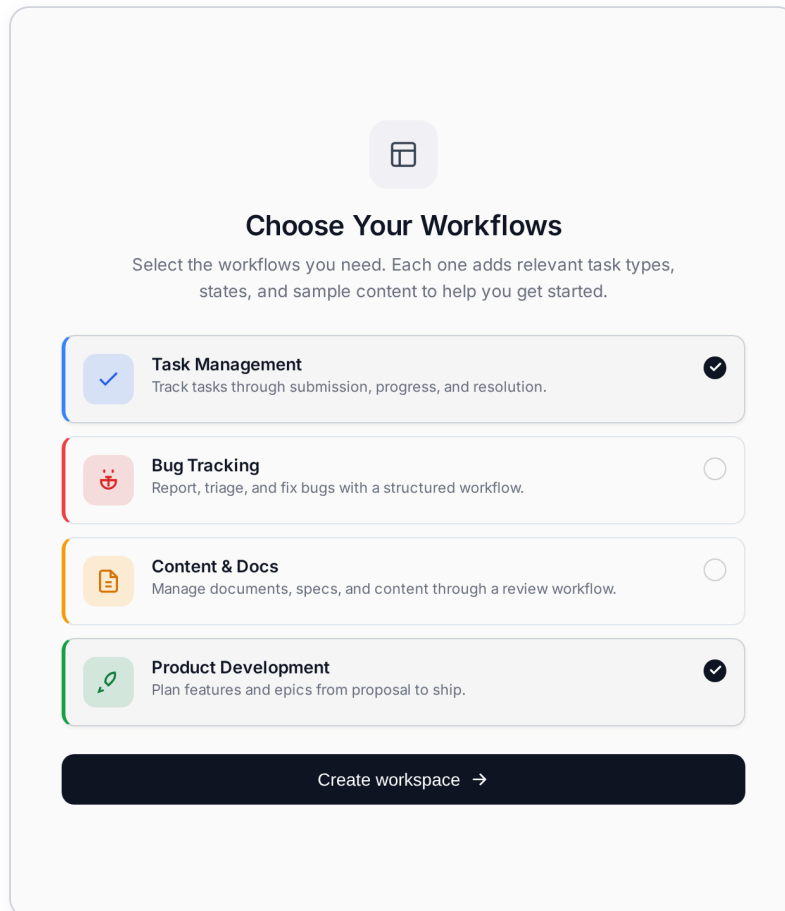
The apps step. Toggle the modules you want; selected apps get a dedicated section in your workspace.

APP	WHAT IT ADDS
Tasks	Work tracking with customisable task types, states, priorities and assignments.
Conversations	Real-time channels, direct messages and threads.
Knowledge	A knowledge base of pages, folders, courses and publishable sites.
Posts	Draft, schedule and publish social posts — co-authored with the Marketing Manager agent.
Testing	Design and run test cases with techniques like EP, BVA and decision tables.

Pick only what's relevant and the interface stays focused; turn more on later as your needs grow. Because apps map directly to sidebar sections, this screen shapes how your workspace feels day to day.

§ Step four: pick a workflow

Rather than starting from an empty board, you choose one or more workflow templates. Each seeds your workspace with relevant task types, states and sample content so there's something to react to from minute one.



The workflow step. Task Management, Bug Tracking, Content & Docs and Product Development — each adds a ready-made structure you can adapt.

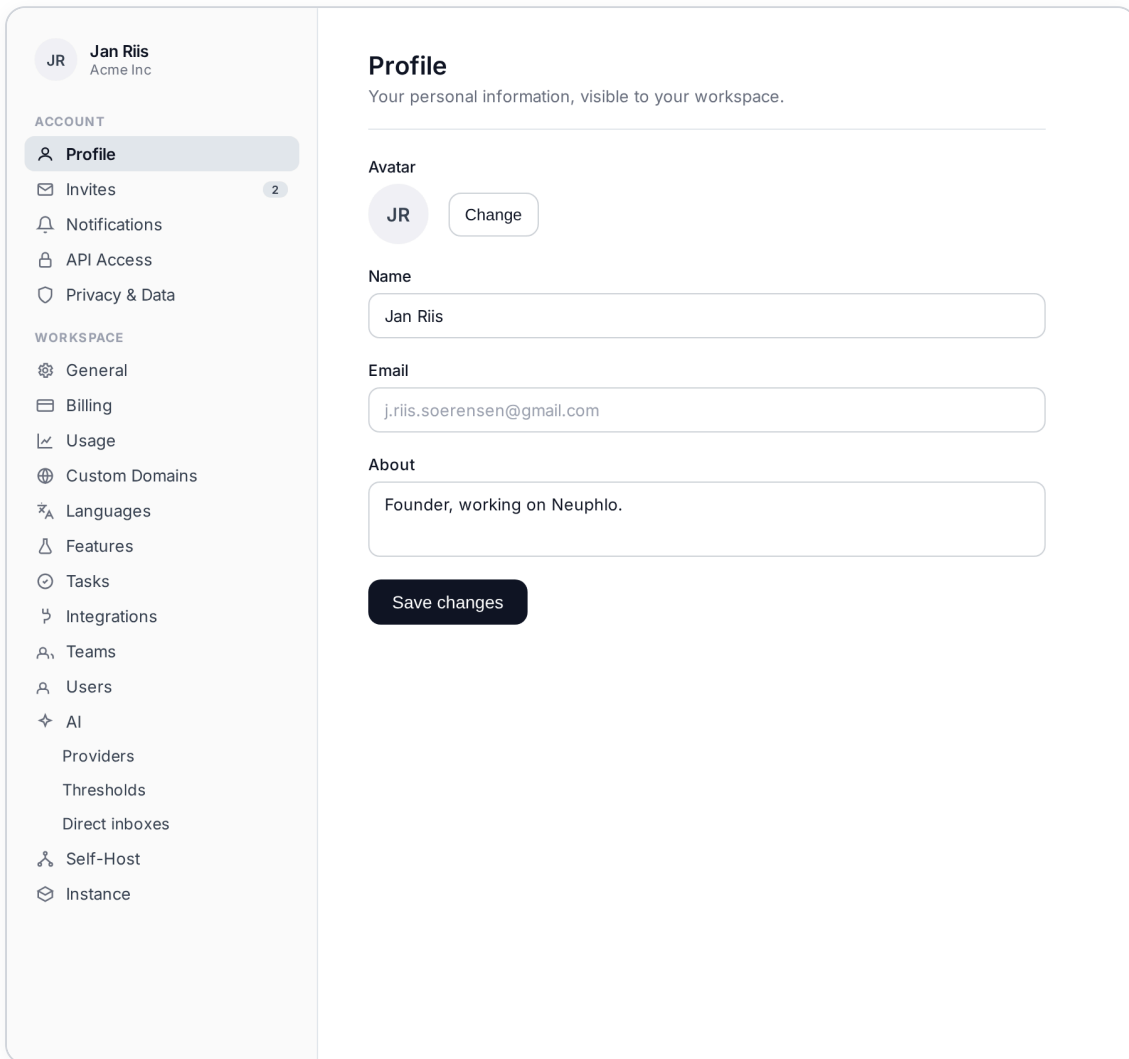
Confirm your choice and Neuphlo builds the workspace — provisioning the apps, workflows and sample content, then syncing it to your device. A brief "setting up" animation covers the work, and then you land on the finish screen, ready to go.

And you're in

The final step hands you three quickstart links — invite a teammate, add your first task, add your first article — so the very next click does something useful rather than leaving you staring at a fresh workspace.

§ Preferences, end to end

Everything you chose during onboarding — and a great deal more — lives in Preferences. It's organised into two groups: **Account** settings that follow you personally, and **Workspace** settings that govern the whole team.



Preferences. Account settings (top) are personal to you; Workspace settings (below) apply to everyone. The active section opens on the right — here, your Profile.

The sidebar adapts to context: billing and usage appear on the cloud, while a dedicated **Instance** section shows up only on self-hosted deployments. Whatever's relevant to your setup is what you see.

§ What's in each group

A quick map of the two groups, so you know where to go when you need to change something.

Account — personal to you

Profile	Name, avatar and bio.
Invites	Pending invitations to other workspaces.
Notifications	What you're alerted about, and how.
API Access	Personal access tokens for the API.
Privacy & Data	Your data and privacy controls.

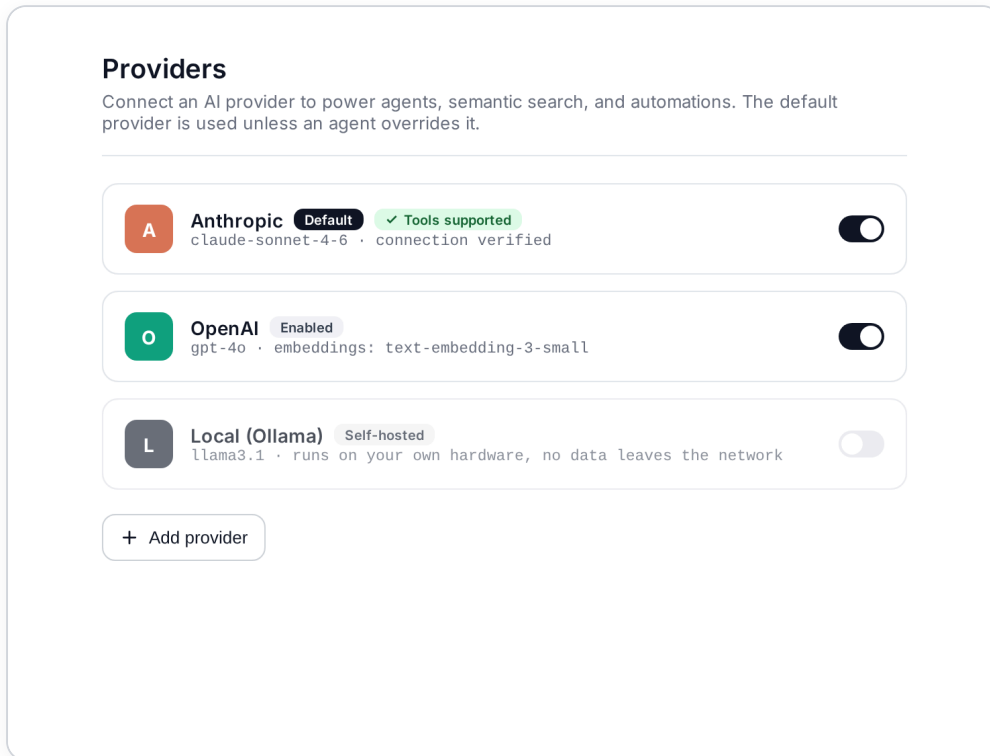
Workspace — for the whole team

General	Workspace name, description and basics.
Billing & Usage	Plan, seats and consumption (cloud).
Users & Teams	Members, roles and team structure.
Integrations	Connect external tools and services.
Custom Domains · Languages · Features · Tasks	Domains, localisation, feature toggles and task-type configuration.
AI	Providers, thresholds and direct inboxes (see next page).
Self-Host · Instance	Pair and manage self-hosted deployments.

Roles matter here: some workspace settings — like managing users or self-host deployments — are reserved for owners and admins, while everyone can manage their own Account group.

§ Connect an AI provider

If there's one thing to configure right after onboarding, it's an AI provider — it powers agents, semantic search and automations. Without it, the AI features stay dormant.



Preferences > AI > Providers. Add a provider, set a default model, and Neuphlo verifies the connection — including whether the model can drive the agent loop.

Connect a hosted provider in seconds with an API key, mark one as the workspace default, and Neuphlo tests the connection — confirming not just that it works, but whether the model supports the tool-calling agents rely on. Because Neuphlo is privacy-first, you can also point at a **local model** on a self-hosted deployment, so prompts and data never leave your network.

§ Where to go next

With a workspace created and a provider connected, the natural next moves are to invite your team, bring in an AI agent from Cowork > AI Agents, and connect the external tools you already use under Integrations.

In short: Neuphlo gets you from first login to a working, personalised workspace through a few guided choices — and Preferences keeps every one of those choices in your hands afterward.