

# Getting started with Locally.ai

Install the app, connect the AI subscription you already have and give your team its first job. About fifteen minutes, no code.



TIME

**15 minutes**

FOR

**Everyone**

VERSION

**v1.0**

# Getting started with Locally.ai

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## 01 Install Locally

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## 02 The welcome steps

When Locally opens for the first time it walks you through six short screens. Here is what to choose.

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## 03 Add your team

After the welcome steps, **Settings** → **General** opens by itself and shows your **Ready-made team** cards.

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## 04 Sign in to your AI

The first time Michael starts, he asks you to sign in to your subscription. This happens once.

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## 05 Your first job

You talk to your team like you would to a colleague. Short, in your own words, in any language.

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## 06 Checklist

Done all of this? Then your team is ready for real work.

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### ■ BEFORE YOU START

- ☐ A Mac or Windows computer you use every day
- ☐ Your licence key from the Whop order page
- ☐ A Claude Pro or Max subscription, or ChatGPT Plus or Pro
- ☐ A few minutes where you can leave the computer on

# Install Locally

Locally.ai is a desktop app. It runs on your own computer, so your files, keys and drafts stay with you.

## 1

## Download the app

Open your Whop order and click **Download & license key**, or use the direct links. Pick the version for your computer.

| COMPUTER | LINK                                              | NEEDS                               |
|----------|---------------------------------------------------|-------------------------------------|
| Mac      | <code>locallyai.whop.site/download/mac</code>     | macOS 11 or newer, In Apple silicon |
| Windows  | <code>locallyai.whop.site/download/windows</code> | Windows 10 or 11                    |

While it downloads, copy your **licence key** from the same Whop page. It looks like `L-XXXXXX-XXXXXXX-XXXXXXX`.

## Install it

**Mac:** open the downloaded file and drag **Locally** onto the **Applications** folder. Then open it from Applications, not from the download window.

**Windows:** open the installer and follow it. Locally starts by itself when it is done.

### NOTE

The first time, your computer may warn you about the app. This is a standard warning for new apps that are not yet registered with Apple and Microsoft; Locally is safe.

**Mac** ("Apple could not verify 'Locally' is free of malware"): click **Done** (not Move to Bin). Open **System Settings → Privacy & Security**, scroll down to "*Locally was blocked...*" and click **Open Anyway**. Enter your Mac password and click **Open**.

**Windows** ("Windows protected your PC"): click **More info**, then **Run anyway**.

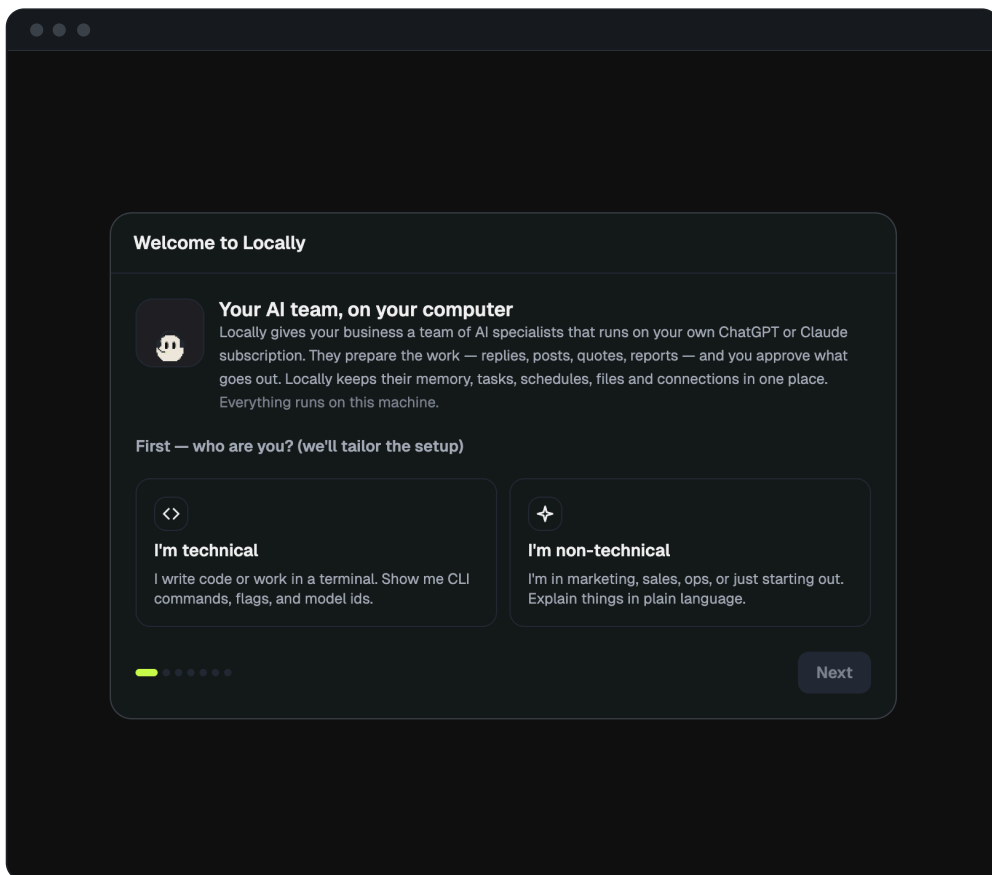
This only happens once.

# The welcome steps

When Locally opens for the first time it walks you through six short screens. Here is what to choose.

## 1 Say who you are

On **Welcome to Locally** click **I'm non-technical**. From then on the app explains everything in plain words. Click **Next**.



Pick I'm non-technical. You can run a business without reading a single line of code.

## 2 Meet your team

Read the **Meet your team** screen. The short version: Michael is your team lead, your team runs on the AI you already pay for, and nothing goes out without you. Click **Set it up**.

## 3 A folder for Locally

**Step 1 of 4** asks for a folder where the app keeps its own notes. Keep the suggested `~/Locally`, click **Create / pick**, then **Next**. You never need to open this folder yourself.

## 4

## Choose your AI

**Step 2 of 4** asks which subscription Michael runs on. Pick the one you pay for:

YOU HAVE

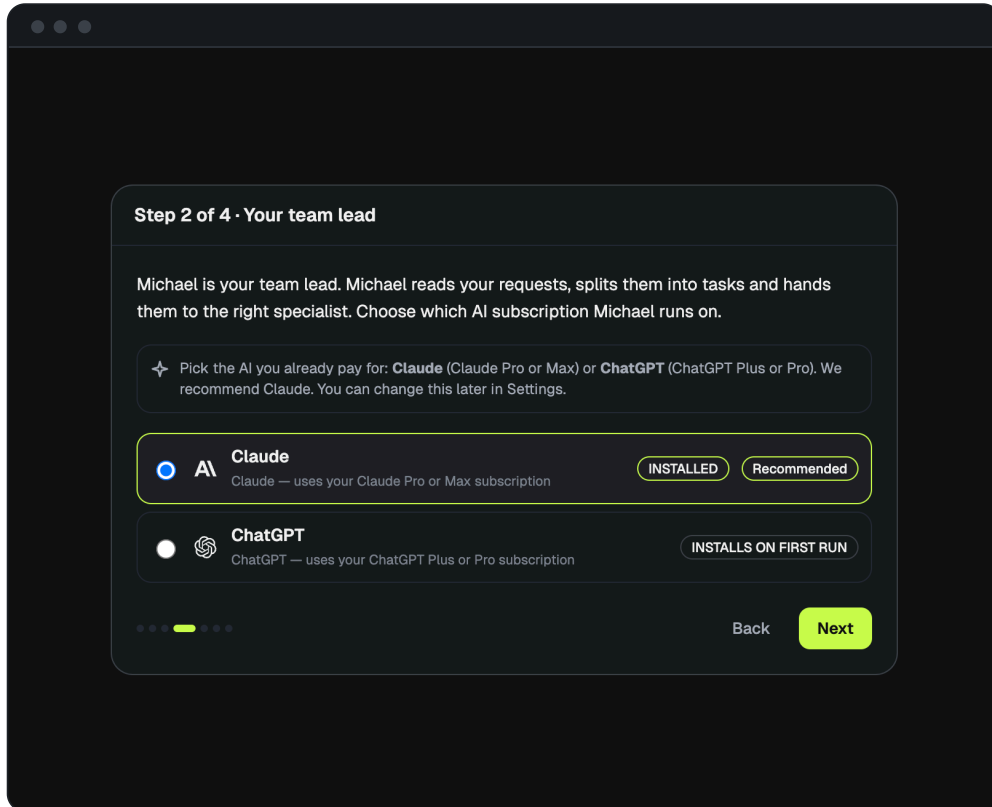
CHOOSE

Claude Pro or Claude Max

Claude (recommended)

ChatGPT Plus or ChatGPT Pro

ChatGPT



Pick the subscription you already have. You can change this later in Settings.

**TIP**

Locally charges nothing for AI use. Your subscription does the thinking, Locally does the organising.

## 5

## Your business files

**Step 3 of 4** is optional. You can add folders with product photos or price lists here, or later. Click **Next**.

## 6

## Activate your licence

On **Activate your Locally kit** paste your key in the box and click **Activate**. The card changes to **Locally kit** and lists the teams in your kit. Click **Next**.

**Activate your Locally kit**

Paste the license key from your Whop order. It unlocks your ready-made team; right after setup you pick who joins. No key yet? Press Next. You can try Locally with 2 specialists and add the key later in Settings → General.

**YOUR PLAN Locally Free**

Free runs up to 2 specialists next to your team lead, and you start their work yourself. Your Locally kit adds unlimited specialists, automatic schedules, your business app connections and your ready-made team. One-time purchase with 12 months of updates; the version you have keeps working.

License key, e.g. from your Whop orders **Activate**

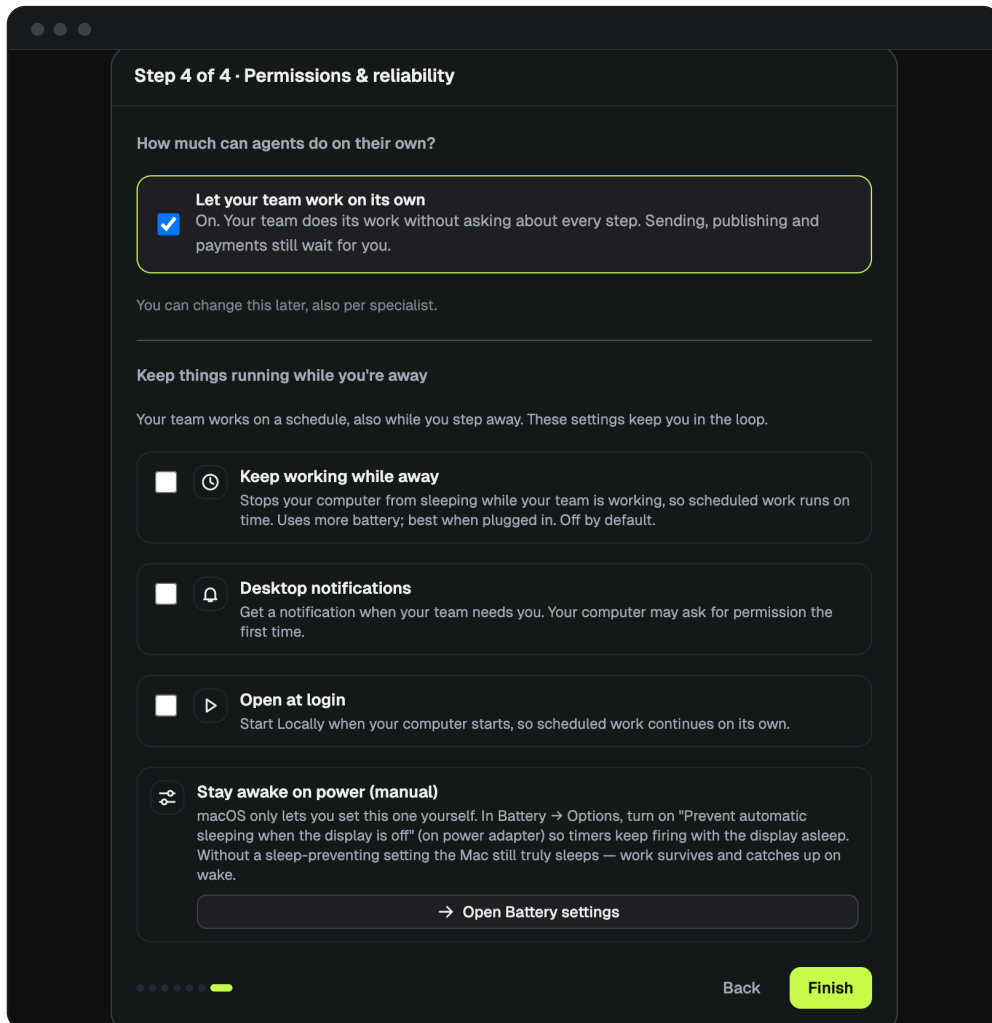
Back **Next**

Paste the key from your Whop order and click Activate. One key works on one computer.

**TIP**

Skipped this step? You can paste the key any time in **Settings → General**.

**Step 4 of 4** has four switches. Turn on **Let your team work on its own** (sending, publishing and payments still wait for you), **Desktop notifications** and **Open at login**. Turn on **Keep working while away** if this computer is usually plugged in. Click **Finish**.



These keep your team working on schedule while you do other things.

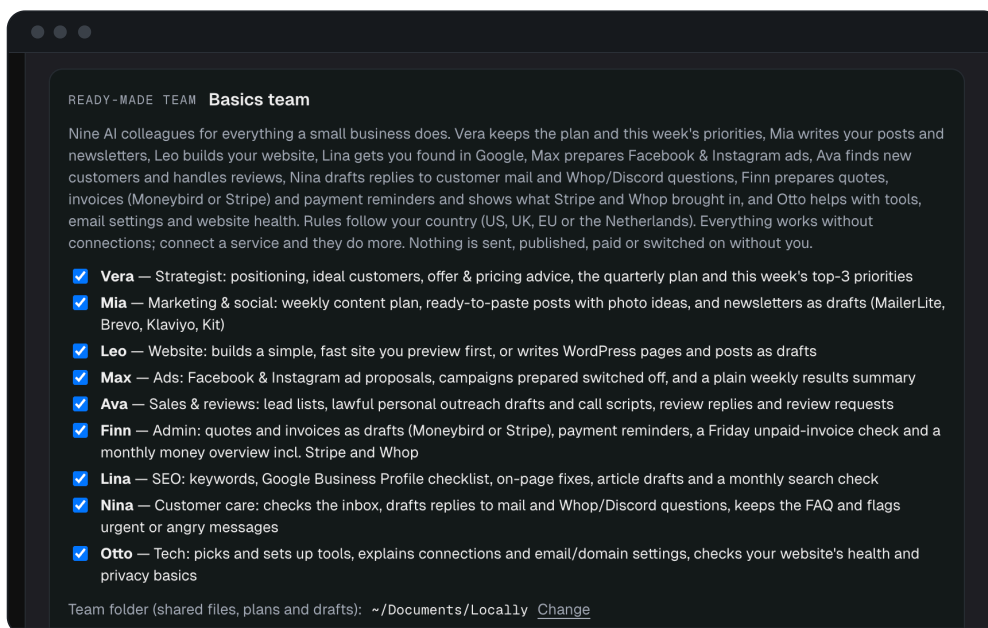
# Add your team

After the welcome steps, **Settings** → **General** opens by itself and shows your **Ready-made team cards**.

1

## Add the Basics team

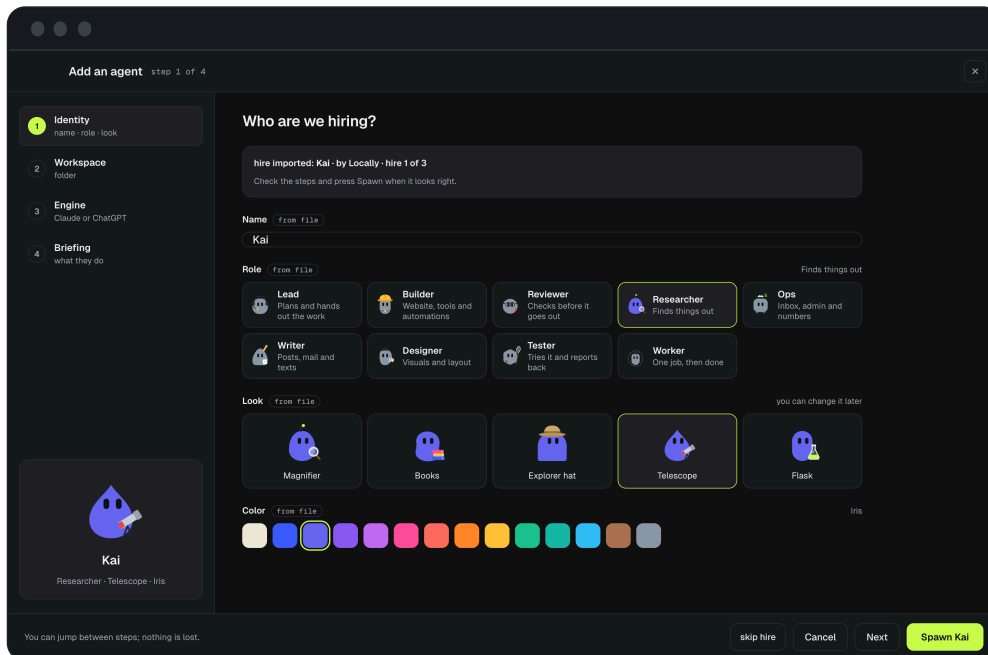
Every kit starts with the **Basics team**: nine colleagues for the things every business does. Leave everyone ticked, check that the **Team folder** says `~/Documents/Locally`, and click **Add 9 team members**.



Untick anyone you do not need yet. You can add them later.

## 2 Press Spawn for each person

A short review window opens for each team member. Everything is already filled in. Click **Spawn** nine times. "Spawn" simply means "start this person".



Nothing to change here. Click Spawn and the next person appears.

## 3 Add your kit team

Scroll down on the same page to your kit's card, for example **Community team** or **Webshop team**, and click **Add 3 team members**. Press **Spawn** three more times. Then click **Close**.

**Michael** TEAM LEAD  
Takes your request, splits it into tasks and hands them out.

**Vera** STRATEGY  
Your positioning, prices and this week's top three.

**Leo** WEBSITE  
Builds a simple site you preview first.

**Ava** SALES  
Lead lists, outreach drafts and review replies.

**Lina** SEO  
Keywords and getting found in Google.

**Otto** TECH HELP  
Explains tools and settings when something is unclear.

**Mia** MARKETING  
Posts and newsletters, ready to paste.

**Max** ADS  
Facebook and Instagram campaigns, prepared switched off.

**Finn** ADMIN  
Quotes, invoices and reminders as drafts.

**Nina** CUSTOMER CARE  
Reads your inbox and drafts the replies.

# Sign in to your AI

The first time Michael starts, he asks you to sign in to your subscription. This happens once.

1

## Open Michael

Click **Workers** in the left sidebar, then **Michael**. His panel opens on the right. If a black text window asks you to sign in:

YOU CHOSE

WHAT TO CLICK

Claude

**Claude account with subscription**, then log in at claude.ai in your browser and click **Authorize**

ChatGPT

**Sign in with ChatGPT**, then approve in your browser

Go back to Locally when the browser says you are done. If the window asks "Do you trust this folder?", choose **Yes**.

2

## Check that everything is ready

Open **Settings** → **Prerequisites**. Every item marked recommended should say **Ready**. If one says Not installed, click **Ask Michael to set up everything**, send the message and click **Check again** when he is done.

# Your first job

You talk to your team like you would to a colleague. Short, in your own words, in any language.

### Tell Michael

Describe what you want. He picks the right people.

### Let them work

Watch the office. Green means working, orange means someone needs you.

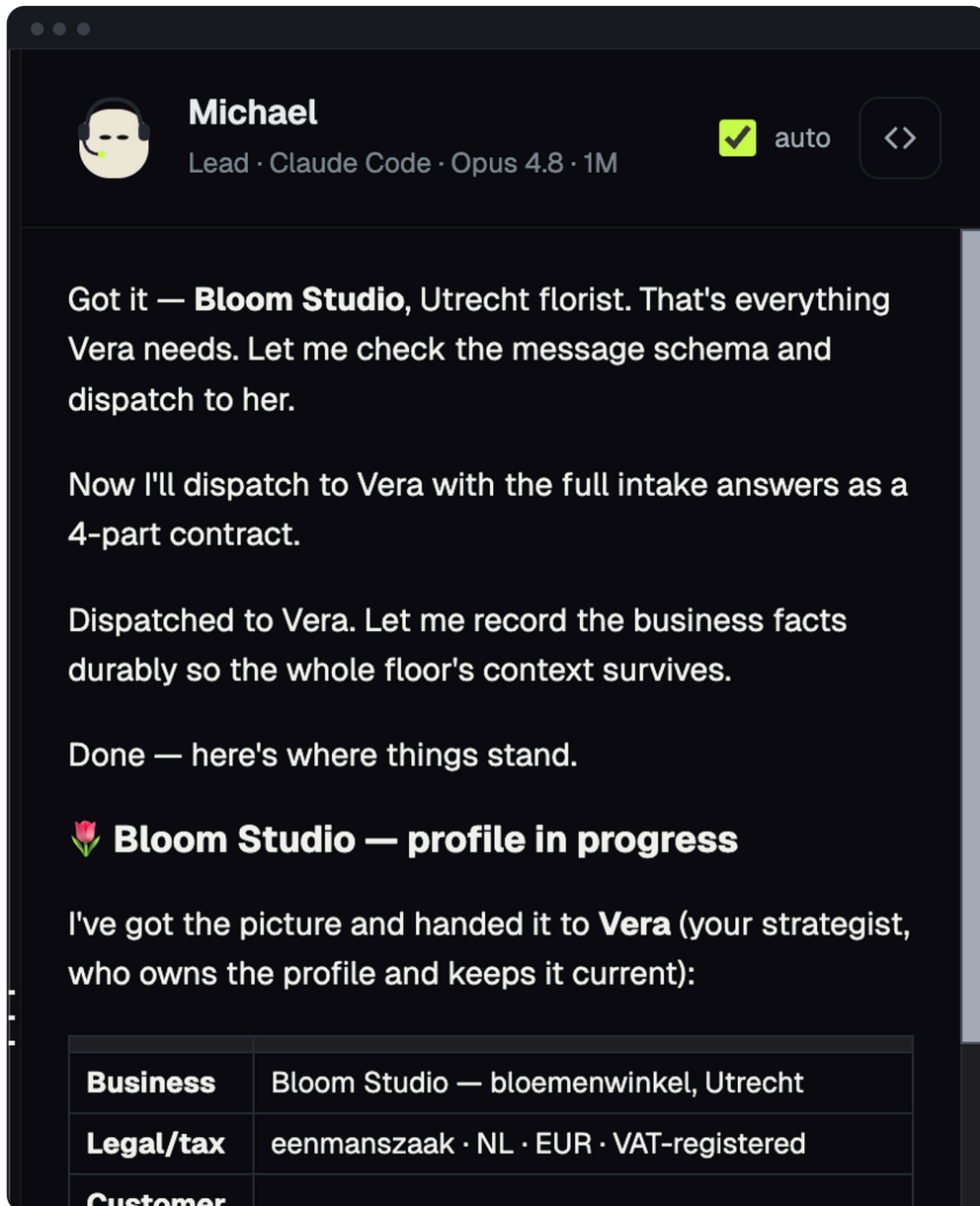
### Read the draft

It lands in your team folder or your mail drafts. You send it.

1

## Fill in your business profile

In Michael's panel click **Get to know my business and fill in the profile**. He asks about ten short questions: what you sell, where, your prices, your tone. Answer in one go, roughly is fine. Vera turns it into `business/profile.md`, which every team member reads before they start.



Michael confirms what he understood and hands it to Vera.

2

## Try a real task

Type one thing you actually need this week, for example:

**TIP**

"Nina, check my inbox and draft replies." or "Mia, write three Instagram posts for this week in my tone." or "Finn, prepare last month's invoices as drafts."

**3**

## Find the result

Drafts are saved in your team folder: **Documents → Locally**. When your mailbox is connected (guide 03), email replies also appear in your mailbox's **Drafts** folder. Read, tweak, send.

**IMPORTANT**

Locally never sends, posts, publishes or pays on its own. Every draft waits for you.

**06**

# Checklist

Done all of this? Then your team is ready for real work.

- 
- ☐ Locally is installed and opens from Applications or the Start menu
  - ☐ Licence key activated, **Settings → General** says Locally kit
  - ☐ Claude or ChatGPT signed in, **Prerequisites** all Ready
  - ☐ Basics team and your kit team added
  - ☐ Business profile filled in with Michael
  - ☐ First draft found in **Documents → Locally**
  - ☐ Next: guide 02 explains the office, guide 03 connects your inbox and apps

# Stuck? We help.

Send us a message with a screenshot of what you see. A real person answers.

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## SUPPORT

Whop chat: [whop.com/locallyai](https://whop.com/locallyai) · Email: [info@locallyai.nl](mailto:info@locallyai.nl)

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## WEBSITE

[locallyai.whop.site](https://locallyai.whop.site)

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## WHOP

[whop.com/locallyai](https://whop.com/locallyai)

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## LINKEDIN

[linkedin.com/company/locallyaiorg](https://linkedin.com/company/locallyaiorg)

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## INSTAGRAM

[instagram.com/locallyai.app](https://instagram.com/locallyai.app)

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## COMPANY

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