



UBWIRU AI

Using Your Ubwiru AI App

The Complete Guide — From First Install to Daily Use

Everything in one place: getting started, using each product,
getting more from your software, your account, and support.

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Seeing "Smart App Control blocked a file that may be unsafe"?

This isn't a virus warning, and nothing is wrong with your download. Ubwiru AI installers aren't yet signed with an expensive commercial certificate, so Windows treats them as unrecognized by default — the same way it would for any small software company's first release. Thousands of legitimate small businesses ship software this exact way. Here's how to tell Windows to trust this specific file:

In the extracted product folder, right-click `install.bat` and choose Properties. At the bottom of the General tab, look for a security note with an "Unblock" checkbox. Check it, then click Apply and OK. This removes the flag Windows attached when the file came out of the ZIP. Double-click it as normal — it should now launch the setup wizard instead of being blocked.

If Smart App Control blocks a different file later in the install (not just `install.bat` itself), repeat the same Unblock step on that file — one Unblock doesn't necessarily cover every file the installer goes on to run. Full details in Part 28.

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GETTING STARTED

What You'll Need Before Starting

- A Windows 10 or 11 computer (or Mac, or Linux, if you know you have that).
- An internet connection — needed for setup, not needed afterward for most features.
- The email from Ubwiru AI with your download link and license file (or, if you're on a free trial, the same two things).
- About 30–60 minutes without needing to rush.
- A little patience — some steps involve waiting for downloads, which is completely normal.

NOTE

You do not need to know anything about programming, AI, or computers generally. If you can send an email and open a web browser, you can do this.

GETTING STARTED

System Requirements

Every Ubwiru AI product runs entirely on your own computer, so how well it performs depends on what you're running it on. Most of the lineup is genuinely light — a handful of tools ask more of your hardware.

Everyday products

Email Agent, Lead Agent, Invoice Agent, Onboarding Agent, Social Agent, Site Doctor, and Privacy Agent:

Requirement	Minimum	Recommended
Operating System	Windows 10 (64-bit), macOS 12, or Ubuntu/Debian 20.04+ or Fedora/RHEL 8+ (or an equivalent distribution)	Windows 11, macOS 14+, or the current release of your distribution
Memory (RAM)	8 GB	16 GB
Free Disk Space	10 GB	20 GB
Graphics Card (GPU)	Not required	Any dedicated GPU speeds up replies

Document Agent

Runs two AI models at once — a bit heavier than the everyday products above:

Requirement	Minimum	Recommended
Memory (RAM)	8 GB	16 GB or more for very long documents
Free Disk Space	12 GB	20 GB
Graphics Card (GPU)	Not required	A dedicated GPU noticeably speeds up long-document summaries

Receptionist Agent

The most demanding product in the lineup — it runs speech recognition, voice synthesis, and the language model together, live, on every call:

Requirement	Minimum	Recommended
Memory (RAM)	16 GB	32 GB
Free Disk Space	15 GB	20 GB
Graphics Card (GPU)	Strongly recommended, 4 GB VRAM or more	8 GB VRAM or more, for consistently fast responses on real calls

NOTE

Not sure your computer measures up, or don't want to guess? We sell Ubwiru G-LOC workstations, built and tested specifically to run our products at full speed — three tiers, from light everyday use up to running several demanding agents at once.

GETTING STARTED

Computer Basics, From Zero

A handful of everyday computer skills come up in this guide. If you already know these, skip ahead to Part 4.

Double-clicking

Quickly pressing the left mouse button twice without moving the mouse in between. On a laptop trackpad, this is usually tapping twice quickly. This is how you open most files and programs.

Files and folders

A folder is like a physical folder that holds papers — except it holds files on your computer. A file is a single item, like a document or program. Folders can contain other folders inside them.

The Downloads folder

When you click a download link in your browser, the file is usually saved automatically into a folder called Downloads. Find it by opening File Explorer (the yellow folder icon in your taskbar) and clicking "Downloads" on the left.

What is a ZIP file?

Many files bundled together into one, to make downloading faster. Recognizable by a little zipper icon and ".zip" in the name. Before you can use what's inside, you need to "extract" it — Part 5 shows exactly how.

Command Prompt (we only use it briefly)

A plain black window where you type instructions instead of clicking. It looks intimidating but every command you need is written out exactly in this guide — just type it exactly as shown and press Enter.

NOTE

To open Command Prompt anytime: click the Start button, type cmd, then press Enter.

Copy and paste

To copy selected text: press Ctrl and C together. To paste it elsewhere: click where you want it, then press Ctrl and V together. You'll use this to load your license file's contents.

GETTING STARTED

Getting Your Files From Ubwiru AI

- 1 Open your email inbox and find the message from Ubwiru AI with your download link.
- 2 Click the download link. Your browser will open a page.
- 3 Click the button to download your installer for your platform (Windows, Mac, or Linux) — it saves automatically into your Downloads folder as a .zip file.
- 4 You should also have a .lic file (your license, or your free trial license). Save it somewhere easy to find, like your Desktop.

NOTE

Can't find the email? Check Spam/Junk, or contact Ubwiru AI at hello@ubwiruai.com.

GETTING STARTED

Extracting (Unzipping) Your Installer

- 1 Open File Explorer and click "Downloads" on the left.
- 2 Find the .zip file you downloaded — it has a zipper icon.
- 3 Right-click it, then click "Extract All..." in the menu that appears.
- 4 A window asks where to put the extracted files — the suggested location is usually fine. Click "Extract."
- 5 A new folder appears with the same name, but without the zipper icon. Open it — this is your installer folder.

NOTE

Dragging this folder to your Desktop makes it easy to find again.

GETTING STARTED

Running the Installer

- 1 Inside the extracted folder, find `install.bat` (Windows), or the equivalent install script for Mac/Linux — it may show as just "install" with a gear icon.
- 2 Double-click it (Mac: right-click and choose "Open" the first time — see Part 28 if Gatekeeper blocks it).

If Windows shows a blue "Windows protected your PC" screen

Completely normal for new software — Ubwiru AI's installer is safe.

- 1 Click the small text that says "More info."
- 2 Click the "Run anyway" button that appears.

What happens next

A black Command Prompt window may briefly open, checking whether Python is already installed. If not, it installs automatically — you may see text scroll by quickly. This is normal, just wait.

CAUTION

If told to close the window and re-run `install.bat`, do exactly that — the second run will be much faster.

GETTING STARTED

The Setup Wizard, Screen by Screen

A friendly window opens with your product's name at the top. Everything from here is done by clicking.

Screen 1: Activate Your License

- 1 Click "Load .lic File..."
- 2 Find and double-click the .lic file you saved earlier.
- 3 Click "Activate." A green message confirms your license is active — click "Continue."

NOTE

Installing Privacy Agent? Activation takes you straight to choosing your AI model — the business-information screens below don't apply, since Privacy Agent doesn't work from your business details the way the other products do.

NOTE

Installing Site Doctor? Activation takes you straight to choosing a project folder and, optionally, connecting an AI provider — the business-information and AI model screens below don't apply, since Site Doctor doesn't use a local Ollama model or work from your business details the way the other products do. See Part 20.

Screens 2-3: Your Business Information (all products except Privacy Agent and Site Doctor)

- 1 Type your business name (the only required field).
- 2 Fill in anything else you'd like, or leave blank and click Next.

Screen 4: Name Your AI Assistant (all products except Privacy Agent and Site Doctor)

- 1 Type a name for your AI (many people just keep "Uri").
- 2 Choose a tone from the dropdown.
- 3 Choose a model size — not sure? Leave the first option selected. (Part 8 explains what this means.)

Privacy Agent's own model screen

Privacy Agent's scans don't need the AI at all — pattern matching finds exposed data, scam flags, and network issues on its own, instantly. The model you pick here is only used when you click "Explain this" on a specific finding, to put it in plain language. Pick based on your computer's graphics memory (VRAM), same idea as Part 8.

Screen 5: Tell Uri About Your Business (all products except Privacy Agent and Site Doctor)

Optional but strongly recommended — it's what stops your AI from guessing or inventing details in its replies.

- **Business type** — pick the closest match from the dropdown, then click "Apply Template" to pre-fill suggested starting text below. Everything stays fully editable.
- **Services offered** — describe what your business actually does, in plain language.
- **Key phrases & terminology** — words specific to your business.
- **Common questions & answers.**
- **Things to never say or promise.**

Installing Receptionist Agent specifically: a Voice picker and a Business Hours field appear here too.

NOTE

None of this is permanent — everything on this screen can be changed anytime afterward from the Customization tab in your control panel.

Privacy Agent's own vault password screen

Used only if you later choose "Encrypt in place" on a finding in the Data Exposure Scanner, instead of shredding it. Pick something you'll remember — there's no recovery if you forget it.

Site Doctor's own screens

Instead of business details, Site Doctor asks you to choose a folder where your projects will be saved, and optionally connect an AI provider (Claude, OpenAI, or DeepSeek) right away — or skip this and add it later from Settings.

Final screens: Product Step, Review, and Install

Your Product	What This Screen Asks For
Email Agent	Your email address, its server, and password (an "app password" for Gmail/Outlook — ask us if unsure).
Lead Agent	Same email details as above, plus an optional word that appears in your contact-form emails.
Invoice Agent	The inbox that receives vendor invoices.
Onboarding Agent	Your outgoing email (SMTP) details — different settings from the above, found on your email provider's site.
Receptionist Agent	Nothing extra beyond Screen 5's Voice and Business Hours fields — this product works best with a good microphone/speaker and a strong computer.
Social Agent	Your social media handles (optional), your own hashtags (optional), and a preferred call-to-action style.
Document Agent	Nothing extra — skip straight to Review.
Privacy Agent	Nothing extra here — its two product-specific screens already happened earlier. Straight to Review.
Site Doctor	Nothing extra beyond its own project-folder and AI-provider screen above — straight to Review.

Then Review — check everything looks right and click "Install." A dark window shows a live progress log while your computer downloads and sets up the AI — the longest part, 5-20 minutes depending on your internet speed.

CAUTION

Do not close this window while it's working, even if nothing seems to be happening for a minute or two — large downloads are still in progress. When you see "All done!", click Finish.

GETTING STARTED

Understanding Ollama and Your AI Model

This explains, in plain language, what's actually being installed behind the scenes during that last step.

What is Ollama?

A small, quiet engine that runs on your computer and does the actual "thinking." It works entirely offline once installed — nothing you type or any of your business data is ever sent over the internet. Ollama alone doesn't know anything; it needs an AI "brain" to run, which is your model.

What is an AI model?

The actual "brain" — trained to understand language and write replies. Ollama is the vehicle; the model is the driver.

Model	Best For
llama3.2:3b	Most computers — fast, capable replies. Needs a decent amount of memory (RAM).
llama3.1:8b	The smartest replies. Needs a powerful computer, ideally with a graphics card (GPU).

NOTE

Not sure which you picked, or want to change it? Open your control panel's Business & AI Info tab anytime (Privacy Agent: its Settings tab).

NOTE

Document Agent needs a second, smaller model too — `nomic-embed-text` — dedicated to finding relevant content across your documents. This downloads automatically alongside your chat model during setup; it isn't something you choose separately.

Why does this take so long the first time?

AI models are large files, similar in size to a movie download. Your computer downloads the whole model once; after that, it's stored locally and never needs to download again unless you switch models.

Do I need to do anything with Ollama myself?

Normally, no — the installer handles installing Ollama and downloading your model automatically. Part 9 is only needed if something went wrong during that step. (Privacy Agent's core scans still work with Ollama unavailable — only the "Explain this" features need it. Site Doctor doesn't use Ollama or a local model at all — see Part 20 for how it connects to AI instead.)

GETTING STARTED

Installing Ollama Yourself (If Needed)

Only follow this if your setup wizard showed a warning about Ollama. Otherwise, skip to Part 10.

Installing Ollama

- 1 Open your web browser and go to ollama.com/download.
- 2 Click the download button for your operating system.
- 3 Once downloaded, run the installer (OllamaSetup.exe on Windows).
- 4 Click through: Next, Install, Finish.

Checking it worked

- 1 Click Start, type `cmd`, press Enter.
- 2 Type exactly: `ollama --version` then press Enter.
- 3 "Not recognized" means: restart your computer and try again.

Downloading your AI model manually

- 1 In that same window, type: `ollama pull llama3.2:3b` (or your chosen model name), press Enter.
- 2 A progress bar downloads the model — can take several minutes.

NOTE

Once both succeed, go back to your installer folder and double-click `install.bat` again — it'll detect these are already present and continue.

GETTING STARTED

Confirming Everything Worked

- ➊ After clicking Finish, look for `manage.py` in your installer folder and double-click it — a control panel window should open.
- ➋ Confirm your license status shows in green at the top.
- ➌ Click the Run tab and start your tool once, following any on-screen instructions specific to your product.
- ➍ If it's Email Agent, Lead Agent, or Invoice Agent: send yourself a test email and confirm a draft appears (check your Drafts folder, not Sent).
- ➎ If it's Receptionist Agent: run `python3 receptionist.py --text-test` in a terminal inside your installer folder, type a question, and confirm you get a sensible reply.
- ➏ If it's Privacy Agent: open the Scan tab and click "Quick Scan" once — a completed scan (even with zero findings) confirms everything installed correctly.
- ➐ If it's Site Doctor: open the Editor and click "Preview" on any file — a browser tab opening confirms everything's wired up correctly.

NOTE

Everything from here on is covered in the rest of this guide — no more installers, no more Command Prompt.

Your Control Panel

Every Ubwiru AI product is opened the same way: double-click `manage.py` in your installer folder (or right-click it, choose "Open with," then Python, if double-clicking doesn't work). The window that opens always has the same basic layout, just with product-specific tabs added.

Always present, every product

- **License status** at the top — green means all is well; gold means expiring within 30 days, with a Renew License button right there.
- A **Run** tab — start your tool working (Privacy Agent and Site Doctor don't have a Run tab in the usual sense — see Parts 19 and 20).
- A **Business & AI Info** tab — your business details, your AI's name and tone, which model it uses (Privacy Agent's equivalent is simpler, and Site Doctor's is an AI Provider screen instead — see Parts 19 and 20).
- A **Customization** tab — your business type template, services, key phrases, FAQ, and things to never say (Privacy Agent's Customization tab is different in kind — it holds scan folders, watched folders, and the process allowlist, not business information; Site Doctor doesn't have one at all).
- A **Logs** tab — a record of recent activity, useful if something seems off.

NOTE

Changes made in Customization or Business & AI Info need the tool to be restarted to take effect — the control panel will remind you of this after saving.

Using Email Agent

How it actually works

Email Agent checks your inbox on a schedule, reads any new message, decides how urgent it is, and writes a draft reply — but never sends anything on its own, except a draft you've deliberately scheduled or told it to send now. Every draft sits in your email account's Drafts folder, waiting for you to review, edit if needed, and send yourself.

Understanding the categories

- **Urgent** — needs a reply today (deadlines, complaints, time-sensitive requests).
- **Action** — needs a reply, but isn't time-critical.
- **FYI** — informational only; no draft is created for these.

NOTE

There is no "spam" category — every real email gets a draft. This is deliberate: a draft you delete costs a few seconds, but a real email silently discarded would be a lost message.

The Activity tab shows every draft created, with Urgent ones highlighted and sorted to the top — so the most time-sensitive messages are never buried under routine ones.

Your daily habit

- 1 Check the Activity tab or your email's Drafts folder a few times a day.
- 2 Read each draft, edit anything that needs a personal touch, and send it — or use Send Now / Schedule (see below).
- 3 If a draft looks off or hallucinated, that's a sign to revisit your Customization tab and add more specific detail.

Making it sound like you

In the Customization tab: pick your business type and click Apply Template for a starting point, then make it yours. If you want it to match your writing voice specifically, paste 1–2 real emails you've written into the "Sample emails" box.

Threads, attachments, and CC

- Replies account for the earlier messages in the same conversation, not just the latest one in isolation.
- PDF and Word attachments on an incoming email are read and factored into the draft.
- If the original email had other people CC'd, the drafted reply keeps them CC'd too.

Reply Templates

For situations that come up constantly with a known best answer — a refund policy, a shipping delay — the Templates tab lets you save a complete, approved reply once. Email Agent recognizes the same situation later by meaning, not exact wording, and uses your saved reply almost verbatim instead of writing something new each time.

Scheduled Sends

Once you've reviewed a draft, the Scheduled Sends tab lets you either send it immediately (Send Now) or schedule it for a specific future time. This requires your outgoing mail (SMTP) settings to be configured once, and the Scheduled Send Watcher (Run tab) needs to be running for a scheduled send to actually go out at the right time.

USING EACH PRODUCT

Using Lead Agent

Lead Agent watches for new submissions from your website's contact form, captures each one as a tracked lead (correctly handling multi-line messages, not just the first line), scores it as Hot, Warm, or Cold priority, and drafts a follow-up reply — same draft-only, never-auto-sent principle as Email Agent.

The Leads tab

- Hot leads always sort to the top, highlighted in red — regardless of when they came in.
- Export to CSV pulls every captured lead into a spreadsheet, for your own CRM or records.

Your daily habit

- 1 Check the Leads tab — Hot leads are unmissable at the top.
- 2 Check Drafts for the follow-up replies, same as Email Agent.
- 3 The tool automatically reminds itself to flag a lead if too much time passes with no response.

Making follow-ups actually answer questions

The Customization tab (business type, services, key phrases, FAQ) is what lets a follow-up reply actually answer a lead's question instead of only ever being able to say someone will follow up.

USING EACH PRODUCT

Using Invoice Agent

Invoice Agent watches your inbox for emailed PDF invoices, extracts the vendor name, amount, and date automatically, and flags anything that looks like a duplicate or an anomaly.

Your daily habit

- 1 Check the Invoices tab after it processes a batch to see what was extracted, and its confidence level.
- 2 Approve invoices you've reviewed — a distinct status from just "processed," for a deliberate sign-off before payment.
- 3 Anything flagged as unusual is worth a second look before it's filed away.

Reducing false alarms

The Customization tab lets you maintain a Trusted Vendors list — known, recurring vendors get a higher bar before an unusual amount is flagged. A genuinely unusual amount still gets flagged even for a trusted vendor.

Catching vendor fraud

If a vendor's bank account or payment details suddenly change between invoices, you'll see a clear before-and-after warning before anything is approved — a common scam pattern where a fraudster impersonates a known vendor with new payment details.

Tax categorization

Each invoice is automatically sorted into a tax category, and Invoice Agent remembers each vendor's usual category so future invoices from the same vendor are categorized instantly.

Payment tracking

The Invoices tab tracks each invoice's payment status — unpaid, partial, or paid — with dates and amounts, and an aging report shows what's overdue at a glance.

Exporting to your accounting software

- **Export for QuickBooks** — clearly labeled columns; you'll map them to your own chart of accounts during QuickBooks' own import step.
- **Export for Xero** — matches Xero's exact required column format for its Bills importer.

NOTE

Scanned (image-based) invoices need OCR software installed separately — computer-generated PDF invoices work without any extra setup.

USING EACH PRODUCT

Using Onboarding Agent

CAUTION

This is the one Ubwiru AI product that sends automatically, by design — there's no draft-review step here. Double-check your sequence content carefully before turning it on for real clients.

Onboarding Agent sends a scheduled welcome sequence to every new client you add, personalized by your AI based on your business details — Day 0, Day 3, and Day 7 by default, though this is fully customizable.

Your daily habit

- 1 Add a new client through the Clients tab whenever you onboard someone — one at a time, or many at once from a CSV file.
- 2 The sequence then runs on its own — no further action needed unless you want to pause it.
- 3 You can pause any individual client's remaining sequence anytime from the Clients tab.

If a send fails

A failed send retries automatically up to 3 times with a longer wait each time. If it's still failing after that, a Retry Failed Steps button in the Clients tab lets you reset it once the underlying issue is fixed.

USING EACH PRODUCT

Using Receptionist Agent

Receptionist Agent can work several ways: as a voice assistant through your computer's own microphone and speaker (for testing or in-person use), or connected to a real dedicated phone — over Bluetooth, a wired connection, or USB/ADB — answering actual incoming calls fully unattended.

Manual mode (microphone testing)

Press Enter to record a few seconds of audio, and your AI responds by speaking back — using whichever voice you chose during setup.

Testing without real audio

Open a terminal in your installer folder and run: `python3 receptionist.py --text-test`. This lets you type as if you were a caller and read the response as text. Type "new" to simulate a fresh caller.

Answering real phone calls

A dedicated Android phone, connected over Bluetooth, a wired connection, or USB/ADB with auto-answer enabled, lets Receptionist Agent answer real calls with nobody present — click "Run Auto-Listen (Unattended, for phone calls)" in the Run tab. Set up the phone/audio device names first in the Customization tab's Phone Hookup section.

- **Bluetooth (Hands-Free Profile)** — the most common option, no cable needed, works like a car's Bluetooth system.
- **Wired** — the phone's headphone/line-out plugged into the computer's mic/line-in port. More reliable than Bluetooth in practice, since there's no wireless connection to drop mid-call.
- **USB/ADB** — connected by cable and controlled directly through Android's own debugging tools, which also unlocks reliable call-end detection (see below).

Setting up ADB (optional, but recommended)

ADB (Android Debug Bridge) lets the software ask the phone directly whether a call has actually ended, instead of guessing from silence — it also enables the USB hookup option above. Without it, everything still works, just using a silence-based guess for call-end detection.

- 1 Install **Android Platform Tools** (provides the adb command) on this computer, and make sure adb is on your system PATH.
- 2 Enable **USB debugging** in the phone's Developer Options (tap Build Number 7 times in About Phone to unlock Developer Options if you don't see it).
- 3 Connect the phone to the computer with a USB cable the first time, and accept the "Allow USB debugging?" prompt on the phone.
- 4 After that, the phone can go back to Bluetooth-only — **wireless ADB** works over the same WiFi network the phone and computer share, no cable needed day to day (search "adb over wifi" for the specific pairing command for your Android version if you want this).
- 5 In `manage.py` → Customization → Phone Hookup, click **Test ADB Connection** to confirm everything's wired up correctly.

Your customization options

- Business type template, services, key phrases, and FAQ — written the way you'd say things aloud, not the way you'd write them.
- Business hours — its own field, since "are you open right now" is one of the most common things a caller asks.
- Topics to hand off to a human — tells your AI when to say a team member will follow up, rather than attempting to resolve something live.
- Voice and language — multiple languages available, each with its own set of voices. Use the Preview button next to the voice picker to hear a sample in your own business's name before choosing.

Call History

Shows every call — start time, duration, and how many turns — with a running daily summary. Every turn is separately assessed for whether it's worth a human reviewing afterward, and flagged turns are highlighted.

USING EACH PRODUCT

Using Social Agent

Generates on-brand posts for Twitter/X, LinkedIn, Facebook, and Instagram — each properly formatted for that platform, not one post copy-pasted everywhere.

Your daily habit

- 1 Open the Generate tab, pick a theme (or let it rotate), click Generate.
- 2 Read every draft before posting anywhere — a social post goes fully public the moment you post it, unlike an email draft only you see first.
- 3 Check the suggested visual note under each batch — a quick pointer on what kind of photo or video tends to pair well.

Generating several days at once

"Generate Multiple Days" produces 3–14 days of themed posts in one sitting, automatically varying the theme. Each day is saved as its own batch as it finishes.

Making it sound like your business

Pick your business type and Apply Template, add your real services and terminology, set your social media handles, add your own branded hashtags (always included first, ahead of generic ones), and choose a call-to-action style (Friendly, Direct, or Low-Pressure).

The link in every post

Every post automatically links back to your own website, with simple tracking tags — check your own analytics later to see which platform is sending you real visitors.

USING EACH PRODUCT

Using Document Agent

Upload contracts, reports, or any long document — get a summary, ask follow-up questions, search across everything you've ever uploaded at once, or compare two versions to see what changed.

Uploading a document

Library tab → Upload Document. Works with **12 file types out of the box** — PDF, Word, PowerPoint, Excel, text, Markdown, RTF, CSV, HTML, EPUB, OpenDocument, and images. Scanned or photographed pages are read automatically with built-in OCR; on the rare occasion a page truly has no readable text, the tool tells you plainly rather than pretending it read something it couldn't.

Getting a summary

Select a document, click Summarize Selected. Even a very long document (100+ pages) gets handled properly — it's read in sections and combined into one overall summary.

Asking questions

The Ask Questions tab lets you type a question about one specific document, or switch "Search in" to "All Documents" to search everything you've uploaded at once. Every answer tells you which page it came from.

Seeing findings in the actual document

"Highlight Flagged Passages" and "Highlight Last Answer's Source" mark the relevant passages directly in a brand-new copy of the file — your original document is never changed.

Comparing two documents

Compare tab → pick Document A and B → Compare Documents. Explains what actually changed in plain language, not just a raw line-by-line diff.

Merge, split, and extract pages

The Tools tab combines multiple PDFs into one, splits a document into individual pages, or pulls out a specific page range — handy file operations without leaving the app.

Portfolio Summary Report

Select several documents in your Library (or none, to cover everything you've uploaded) and generate a single Word document with one section per file, each with its summary and anything flagged against your profession's "watch for" list. Built for reviewing a whole batch of contracts, leases, or reports in one sitting instead of opening each one individually.

Customizing for your field

The Customization tab lets you pick your profession (Law, Real Estate, HR, Compliance, Insurance, Healthcare Administration, Accounting, or General) for sensible starting defaults — every field's defaults include appropriate professional boundaries baked in, like never offering legal or medical advice.

USING EACH PRODUCT

Using Privacy Agent

Privacy Agent is different from every other Ubwiru AI product in one important way: it's not built around your business — there's no Business Type Customization, no email inbox, no client list. It's a correlated intrusion-detection system for the computer it's installed on, made of several independent capabilities you can use as much or as little of as you want. Its control panel has its own tabs: Scan, Findings, Scam Analysis, Watchdog, Network, Analyst, Settings, and Logs.

Correlated Incidents, Not Alert Noise

Related findings that share a device or timeframe are automatically grouped into one incident instead of scattering across separate, disconnected alerts — so you review one clear picture of what's happening, not a wall of individual warnings.

Analyst Mode

For anyone who wants to dig deeper than the plain-language incident summary, Analyst Mode shows the raw event data underneath — and a Sigma-inspired custom rules engine lets you define your own detection rules beyond the built-in ones.

Phase 1 — Data Exposure Scanner (Scan / Findings tabs)

- Quick Scan checks the common spots — Desktop, Downloads, Documents (and Pictures on Windows).
- Deep Scan checks your entire home folder, skipping program folders and developer clutter.
- Looks inside .txt, .csv, .json, .xml, .log, .ini, .env, .pdf, .docx, and .xlsx files for exposed Social Security numbers, card numbers, AWS keys, private encryption/SSH keys, and plaintext passwords or API keys.
- The Findings tab never shows the full sensitive value — only a redacted preview.
- Click "Explain this" on any finding for a plain-language read from your local AI — the only place in Phase 1 the AI gets involved.
- For each finding, you choose: Shred (securely overwrites, then deletes) or Encrypt in place (locks with your vault password, then shreds the plaintext original). Nothing happens automatically.

Your daily habit (Phase 1)

- 1 Run a Quick Scan every so often — weekly is a reasonable habit for most people.
- 2 Review anything flagged in the Findings tab; click "Explain this" if you're not sure what a finding means.
- 3 Decide Shred or Encrypt in place for anything real.

Phase 2 — Scam & Manipulation Analysis (Scam Analysis tab)

Paste a suspicious email, text, or raw web page source and click Analyze. Rather than a flat "safe/unsafe" verdict, you get a plain-language explanation of exactly why something looks manipulative — false urgency, someone impersonating an authority, a request for gift cards or crypto, a push for secrecy, and so on.

You can also turn on the Folder Watcher to automatically analyze new .txt, .eml, and .html files that land in your Downloads folder (or any folder you add) — off by default.

NOTE

This is heuristic, not exhaustive — a well-crafted message that avoids every known pattern won't trigger a flag on its own, and patterns are English-language only for now. Treat it as a second opinion, not a guarantee.

Phase 3 — Ransomware-Pattern Watchdog (Watchdog tab)

This is the one phase that runs continuously rather than on demand. Turn it on and it watches Desktop, Documents, and Pictures (plus any folders you add) for the clearest behavioral sign of ransomware: a burst of your own files being renamed or rewritten in rapid succession.

CAUTION

Unlike the rest of Privacy Agent, this phase takes automatic action once it triggers. It stops watching immediately and makes a best-effort attempt to shut down the process responsible — skipping common backup/sync tools (OneDrive, Dropbox, Backblaze, Time Machine) on its allowlist by default. It does not resume on its own; you click "Resume monitoring" once you've reviewed what happened.

A few honest limits worth knowing: identifying the responsible process is best-effort (weakest on macOS, where the app may need Full Disk Access granted); a slow, careful attacker who stays under the threshold won't trigger it; and it stops the spread from the moment it fires — it doesn't recover files already encrypted before that.

Phase 4 — Home Network Guardian (Network tab)

- Scan Now finds every device on your home network, guesses what kind of device each one is, and checks for a short list of commonly-risky open settings.
- See every device laid out as a live topology map, not just a list.
- Privacy Agent never attempts to log into anything it finds — including your own devices. You get a plain-language reminder to check default passwords instead.
- New-device monitoring (off by default) checks every couple of minutes and alerts you the first time an unfamiliar device joins.

Learning your network's normal

A behavioral baseline learns what's typical for your network over time, so it can flag genuinely new destinations and beaconing-style patterns — the kind of subtle signal a one-off scan would miss entirely.

Decoy tripwire files

Plant deception files in sensitive-looking spots from the Settings tab; any attempt to read one is a near-certain sign something is snooping where it shouldn't be.

NOTE

This only sees your home network — a separate guest Wi-Fi, a VLAN, or a corporate-style network won't show up the same way. It's also only watching while your computer is on.

Settings tab

This is where the scan/watch folders, the ransomware process allowlist, decoy file placement, custom rules, your AI model choice, and your vault password all live — the closest thing Privacy Agent has to the other products' Business & AI Info / Customization tabs.

USING EACH PRODUCT

Using Site Doctor

Site Doctor is also different from every other Ubwiru AI product, in a different way than Privacy Agent: instead of running one local AI model included with your license, it connects to an AI provider you choose — Claude, OpenAI, or DeepSeek — using your own account and your own API key. There's no Business Type Customization and no Ollama model to pick; setup asks for a project folder and, optionally, that API key instead.

Starting a project

Four ways to start:

- A **blank project**.
- An **existing folder** already on your computer.
- A page **imported from a URL**, for learning how it's built (see the responsible-use note in the app).
- Your own website's **backup/export zip**.

Editing and previewing

Real syntax highlighting for PHP, HTML, CSS, JavaScript, Python, SQL, and JSON, in Ubwiru's own brand colors. One-click Preview renders any page in your actual browser instantly — PHP pages need PHP installed separately on your computer to run as PHP rather than showing as raw code; Site Doctor tells you plainly if it can't find one.

Checking for errors, and fixing them

Error checking runs instantly and for free, with no internet or AI cost needed. When something's wrong, click "Explain & Fix This" for a plain-language explanation of what actually happened and a proposed fix — this step uses your connected AI provider.

Building something new

Describe what you want in plain language, and Generate New Site produces a complete, working set of simple HTML/CSS files — nothing to install, ready to open immediately.

Reusing what works

- **Extract a reusable piece** from any site — a pricing grid, an admin toggle, a whole page layout — and mix and match it into something new, with real business details automatically replaced with clear placeholders you fill in yourself.
- **Save any online fix as an offline recipe**. The next time the same problem comes up, it's fixed instantly, for free, with no internet needed at all.

Connecting your AI provider

Settings → AI Provider lets you paste in an API key from Claude, OpenAI, or DeepSeek — Ubwiru AI never sees your key, your code, or your site. Online features (Generate New Site, Explain & Fix This, component extraction) need this key and an internet connection; the offline recipe library and manual editing work without either.

CAUTION

Your API key is stored locally on your own computer, in plain text, for simplicity — not in a secure system keychain. Keep your disk encryption turned on, and don't sync this folder to cloud backup. See the note in Settings for the full explanation.

Payment testing (optional)

If you sell things on your own site, Settings also has an optional Stripe test-mode check — confirms your test credentials work using Stripe's own published test card, never a real one, and refuses outright if you paste anything that looks like a live key.

NOTE

Unlike every other Ubwiru AI product, this one isn't fully offline by design, and your chosen AI provider's own usage costs apply on top of your Site Doctor license — a small amount per use, scaling with how much code is involved in the request.

Using Multiple Products Together

If you own more than one Ubwiru AI product, a few things are worth knowing about how they coexist on the same computer.

They share Ollama, not much else

Ollama — the AI engine each product depends on — is a single, shared installation on your computer, not a separate copy per product. If you already have one Ubwiru AI product installed and set up a second, its installer detects Ollama is already present and skips straight past that step. Each product still downloads its own chosen AI model the first time it needs one — picking the same model for two products doesn't cause a conflict or download it twice. (Site Doctor is the exception — it doesn't use Ollama at all, so it has nothing to share here.)

Beyond that, every product is independent: its own installer folder, its own license file, its own control panel, its own Business & AI Info and Customization settings. Changing Email Agent's tone doesn't affect Receptionist Agent's, even if they're both installed on the same computer.

A few combinations worth setting up deliberately

- **Lead Agent + Onboarding Agent** — when a lead converts into a real client, add them in Onboarding Agent's Clients tab to kick off the welcome sequence right away.
- **Email Agent + Document Agent** — if customers frequently send contracts or recurring paperwork, upload the common document types to Document Agent once, so you can ask it questions instantly instead of re-reading the same kind of document by hand each time.
- **Site Doctor + any other product** — since Site Doctor doesn't touch your business data or use Ollama, running it alongside any other product needs no extra thought at all.

Getting More From Your Software

A handful of habits that make the difference between software that feels generic and one that actually sounds like your business.

The one habit that matters more than any other

Every product's output is only as good as what's in its Customization tab. This comes up individually in Part 12 through Part 19, but it's worth saying plainly once, on its own: a thin Customization tab is the single most common reason a reply, post, or answer feels generic or slightly wrong. Five extra minutes filling in real services, real phrasing, and a few FAQ entries usually fixes it completely — more effectively than anything else you could adjust.

Restart after changing settings

Changes to Customization or Business & AI Info need the tool restarted to take effect. It's easy to make a change, expect it to apply immediately, and wonder why nothing's different — the control panel reminds you after saving, but it's worth building the habit anyway.

Review before you trust

Every product except Onboarding Agent shows you a draft before anything goes out, on purpose. Resist the urge to rubber-stamp drafts once they start looking consistently good — the review step is also how you notice when your Customization tab needs more detail, per the habit above.

If something feels slow

That's almost always a hardware question, not a setup mistake — see Part 2 for what each product actually needs, and Ubwiru G-LOC if you'd rather not guess at what to upgrade.

Keeping Your Settings Safe

Your license and everything you've set up in Business & AI Info and Customization live in your installer folder, on this computer — not on Ubwiru AI's servers. That's deliberate, and it's what keeps your business data private. It also means it's worth a moment of your own precaution.

What to keep a copy of somewhere safe

- Your .lic file — without it, reactivating on a new or reformatted computer means contacting Ubwiru AI to reissue it.
- Your entire installer folder, periodically — it holds your Customization details, so if this computer is lost, stolen, or replaced without a copy, you'd be rebuilding your business type, services, key phrases, and FAQ from scratch.

NOTE

A copy on a USB drive, an external hard drive, or a personal cloud storage folder is enough — it doesn't need to be anything elaborate. The only real mistake is having no copy anywhere but the computer itself.

Moving to a new computer

CAUTION

Email hello@ubwiruai.com before reinstalling on a new machine — the team needs to release your license's current machine lock first, or activation on the new computer won't succeed.

Updating to a New Version

When Ubwiru AI releases an update to a product you own, it appears on your account dashboard as a new download for your platform.

- 1 Log into your dashboard and download the new installer for your product.
- 2 Extract it, same as the first time.
- 3 Run install.bat (or your platform's installer) inside the new folder.

NOTE

If you extract the new version into the same folder as your existing installation, your license and settings are typically detected and carried forward automatically. If you extract to a fresh folder instead, reload your .lic file and revisit your Customization tab afterward to confirm everything looks right — when in doubt, check before assuming.

Uninstalling

Every product includes its own uninstaller, in the same folder as install.bat.

- 1 Open your product's installer folder.
- 2 Find uninstall.bat (Windows) or the equivalent script for Mac/Linux.
- 3 Double-click it and follow the on-screen prompts.

NOTE

Uninstalling removes the product's own files. It does not cancel your subscription or license — contact hello@ubwiruai.com for anything account-related.

YOUR ACCOUNT

Your Account Dashboard & Getting Support

Everything before this covers the software itself, once installed. This part covers the website side of your account — where your license, purchase history, and support live.

Logging in

Go to `login.php` anytime to see:

- Every product you own, with its status and a download button auto-detected for your platform (Windows, Mac, or Linux).
- Your full purchase history.
- Your support tickets.
- A place to change your password (current password required, new one at least 8 characters).

Downloading for your platform

Your dashboard automatically detects whether you're on Windows, Mac, or Linux and shows one clear download button. If you need a different platform, click "Choose a different platform" underneath. If a product isn't built for your specific platform yet, the page says so honestly rather than giving you a broken download.

Submitting a support ticket

- 1 From your dashboard, find Support Tickets and click New Ticket.
- 2 Give it a subject and describe what's going on.
- 3 Submit — the team is notified immediately.
- 4 You'll get an email reply, and can continue the conversation on the ticket page directly.

Chat with Uri

Click the chat bubble on any page of the website for instant answers about installation, licensing, or general questions — Uri is trained on this guide and can walk you through most issues in plain language right away.

Moving to a new computer

CAUTION

Email `hello@ubwiruai.com` before reinstalling on a new machine — the team needs to release your license's current machine lock first, or activation on the new computer won't succeed.

YOUR ACCOUNT

Renewing Your License

- 1 When Ubwiru AI emails you a new license (before or after your current one expires), open your control panel.
- 2 Click "Renew License" at the top.
- 3 Load the new file and click Activate — no reinstalling needed, and your status updates immediately.

REFERENCE

When Something Goes Wrong

What You See	What to Do
Nothing happens when I double-click install.bat	Right-click it and choose "Run as administrator."
A blue security screen appears	Click "More info" then "Run anyway" — normal and safe.
"Smart App Control blocked a file that may be unsafe"	Right-click install.bat → Properties → General tab → check "Unblock" → Apply → OK, then double-click it again. See the note below for what to do if this happens again on a different file.
macOS blocks the installer (Gatekeeper)	Right-click the app and choose "Open" instead of double-clicking — only needed the first time.
It says my license is invalid	Make sure you loaded the exact .lic file Ubwiru AI sent — not a partial copy.
Setup seems stuck on "Installing..."	Large downloads can take 10-20 minutes on slower internet — leave it running.
"Python is not recognized"	Restart your computer, then double-click install.bat again.
My AI model didn't finish installing	See Part 9 — re-running install.bat resolves most cases.
I closed a window by accident	Just double-click install.bat again — safe to re-run anytime.

NOTE

This warning is about our installers not yet carrying an expensive commercial code-signing certificate — not a virus flag. The Unblock checkbox fixes one file at a time — it removes the "this came from the internet" flag Windows attached to that specific file. If Smart App Control blocks a different file later in the same installation (for example, something the installer downloads partway through), the fix is the same: right-click that file, Properties, Unblock, Apply, OK. One Unblock does not automatically cover every file an installer goes on to run.

NOTE

Still stuck? Click the chat bubble on ubwiruai.com and describe what you're seeing — Uri has read this entire guide. Or email hello@ubwiruai.com.

REFERENCE

Getting Help

- Click the chat bubble on ubwiruai.com and ask Uri — it can walk you through most day-to-day questions.
- Email hello@ubwiruai.com for anything else.
- Check your Logs tab first if something seems wrong — the exact wording of any error helps a lot when asking for help.

Glossary

Term	What It Means
Double-click	Pressing the mouse button twice quickly without moving it.
Download	Saving a file from the internet to your computer, usually into Downloads.
Extract / Unzip	Unpacking a .zip file so you can use what's inside.
File Explorer	The yellow folder-icon program for browsing your computer's files.
Command Prompt	A black window where you type text commands instead of clicking.
.lic file	Your personal license file that unlocks the software you purchased.
Ollama	The program that runs your AI "brain" entirely on your own computer, offline. (Not used by Site Doctor.)
AI Model	The actual "brain" (llama3.2:3b or llama3.1:8b) that understands language and writes replies.
Control Panel (manage.py)	The window you use every day to run your tool and manage settings.
Draft	A reply your AI has written but not sent — sits in your email's Drafts folder until you review and send it.
Customization Tab	Where you tell your AI about your actual business (Privacy Agent's holds scan/watch settings instead; Site Doctor doesn't have one).
Business Type Template	A starting set of suggestions for your industry, applied with one click (not used by Privacy Agent or Site Doctor).
Escalation / Hand-off	(Receptionist Agent) A topic your AI defers to a human on, rather than answering live.
Text-Test Mode	(Receptionist Agent) A way to test conversation by typing instead of speaking.
ADB (Android Debug Bridge)	(Receptionist Agent) Android's own debugging tool; connecting it enables the USB hookup option and lets the software ask the phone directly whether a call has ended, instead of guessing from silence.
Call-to-Action Style	(Social Agent) The tone your posts end on — Friendly, Direct, or Low-Pressure.
Semantic Search	(Document Agent) Finding relevant content by meaning, not just matching exact words.
Portfolio Summary Report	(Document Agent) A single Word document summarizing several selected documents at once, one section per file.
Trusted Vendor	(Invoice Agent) A known, recurring vendor given a higher bar before an unusual amount gets flagged.
Quick Scan / Deep Scan	(Privacy Agent) The common-folders-only scan vs. the whole-home-folder scan.
Shred / Encrypt in Place	(Privacy Agent) The two remediation choices for a Phase 1 finding.
Vault Password	(Privacy Agent) The password protecting anything you choose to "Encrypt in place."
Analyst Mode	(Privacy Agent) A view of the raw event data behind a correlated incident, for anyone who wants to dig deeper than the plain-language summary.
Behavioral Baseline	(Privacy Agent) A learned picture of what's normal for your network, used to flag genuinely new or beaconing-style connections.
Decoy / Tripwire File	(Privacy Agent) A planted file that isn't real; any attempt to read it is a near-certain sign of snooping.

Auto-Response (Watchdog)	(Privacy Agent) The Ransomware Watchdog's automatic stop-and-terminate action — the one place in Privacy Agent that acts without asking first.
API Key	(Site Doctor) A personal access code from your AI provider (Claude, OpenAI, or DeepSeek) that lets Site Doctor's online features work using your own account.
License Renewal	Extending your license for another year without reinstalling anything.