

# Quickstart: your first hour

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## Who this is for

New owners and admins setting up SynapBridge for themselves or a small group, and people who have just received an invitation.

## Before you start

You need:

- A work or personal email address you can read right now. Business plans need a work email.
- A phone or other device with an authenticator app that supports time-based one-time codes (TOTP).
- A password manager for your password and backup codes.
- An API key from at least one AI provider you already use, if you want to chat. SynapBridge works with the provider keys you bring.

**Note** Screens and labels in this guide follow the product as built today. If a label on your screen differs, trust the screen and tell support.

## Step 1: Create your account

If someone invited you, skip to "Accept an invitation" below.

- 1 Open the SynapBridge sign-up page. The progress bar shows these steps: Plan, Account, Verify, MFA, Payment, Done.
- 2 On Plan, choose a plan. Free plan sign-ups skip the Payment step.

- 3 On Account, enter your email (the field reads "Work email" on business plans), a password, the same password again under "Confirm password", and your full name. Business plans also ask for a workspace name. You can use "Sign up with Google" or "Sign up with Microsoft" instead of a password. With either, the email-code step (Verify) is skipped because the sign-in provider verifies your email, and you go straight to MFA.
- 4 Choose a password of at least 12 characters. The form asks for a mix of upper and lower case letters, at least one number and at least one symbol.
- 5 On Verify, type the 6-digit code that was emailed to you. The code expires after 10 minutes. Use "Resend code" if it does not arrive.
- 6 On MFA, scan the QR code with your authenticator app and enter the 6-digit code it shows.
- 7 Save your backup codes. Each code works once. You can copy them or download a .txt file. To continue, type any one of the codes back into the box.
- 8 You may be offered "Add a passkey?" You can set one up or choose "Skip for now". You can add a passkey later from Settings.
- 9 Paid plans then show a Payment step, which states how many trial days apply to your plan. On Done, choose "Set up your workspace" or "Skip and explore".

## Accept an invitation

- 1 Open the email with the subject "You've been invited to a SynapBridge workspace". It comes from admin@synapbridge.com.
- 2 Open the link in the email. The link expires 7 days after it was sent. The email does not contain a temporary password.
- 3 On the invite page, enter your name (optional), a password of at least 12 characters, and the same password again. Choose "Join workspace".
- 4 You are then taken to sign in. Expect to set up MFA (an authenticator app and backup codes) as described in Step 1.
- 5 If the link is expired or already used, ask whoever invited you to send a new one.

## Step 2: Invite your people

Only Owners and Admins can do this.

- 1 Open your account menu at the top of the screen and choose "Users". You can also open Settings, then "Admin center", then Users. The Users and Admin center links in Settings are shown from the Team plan.
- 2 Choose "Add user".
- 3 Enter the person's email and pick a role: Viewer (read-only), Member (standard access) or Admin (manage users and settings).
- 4 Choose "Send invite". The panel confirms "Invite sent".

Admins can invite people as Member or Viewer. Inviting someone as Admin needs an Owner. The invite panel does not offer Owner. See the guide "Users, roles and permissions" for details.

## Step 3: Connect a provider with your own key

SynapBridge does not include model access. You connect your own provider accounts.

- 1 Open Settings, then "AI providers". The "Connect & set up" page and "Workspace setup" in the account menu also lead here.
- 2 Find your provider and choose "Connect". Some providers use a sign-in consent screen. Others use an API key.
- 3 For an API key, open the provider's key page (the form links to it with "Open key dashboard"), create a key, and paste it into the key box.
- 4 Choose "Save & verify". SynapBridge checks the key. The tile shows "Connected" when it works. If it shows "Validation failed" or "Auth failed", check the key and try again.
- 5 Later you can use the tile menu to validate, rotate or revoke a connection. A connection marked "Shared" is shared with your organization, and only an Owner or Admin can rotate or revoke it.

**Note** Provider usage is billed by the provider on your own account, separately from your SynapBridge plan.

## Step 4: Send your first chat

- 1 Choose "Chat" in the sidebar.
- 2 If you see "Connect an AI provider to start chatting", go back to Step 3.
- 3 Type a question in the box at the bottom and send it.
- 4 The response shows which model answered and the cost of the turn. Where SynapBridge has no exact rate for a model, the cost is labelled as an estimate (est.). Your provider's invoice is the source of truth.

## Step 5: Compare models

- 1 In Chat, find the "Panels" control and choose 2, 3 or 4.
- 2 Send a message. Each pane answers with a model you have connected.
- 3 Below the answers, "This turn, side by side" lists Model, Latency, Output tokens, Cost and Best pick.
- 4 Choose "Best" on the answer you prefer. There is no automatic quality score. Your picks are the quality signal.

Comparison needs more than one connected model. A single provider key can give you more than one model.

## Step 6: See what SynapBridge remembers

- 1 Open Library, then Memory. The page is titled "Memory graph".
- 2 You see facts such as preferences, context and notes. Use the Source filter to separate "User input" from "Auto-extracted from chat".
- 3 Choose "New fact" to add one yourself.

Each fact has a type, such as Preference, Context, Entity, Relationship, Note, Prediction or Transcript. To find a past conversation, use "Search your chats" in Chat.

## Step 7: Find governance

- Governance: the sidebar item for Owners and Admins, shown from the Team plan. It includes Overview, Audit trail, Policies and Approvals & delegation. If you do not see it, your role or plan does not include it.
- Audit trail: needs Pro or above, and the Owner or Admin role.
- Policies: needs Business or above.
- Usage and cost: Insights, then "Usage & spend".
- Spend limits: Admin center, then Cost management, then "Cost caps" (Business plan). A cap can warn or block when it is reached. Caps are checks, not guarantees.

## Limits and notes

- Some admin features can show "not available for your workspace yet". Contact SynapBridge support to enable them.
- Backup codes cannot be shown again after you leave the screen. If you lose your authenticator app and your codes, use the recovery page. "I have a backup code" resets MFA at once. "I don't have my backup codes" uses an emailed code and schedules the reset 24 hours later.
- SynapBridge is architected to align with the SOC 2 Trust Services Criteria.
- A HIPAA business associate agreement program is planned. Do not put protected health information into SynapBridge until a signed agreement is in place.