Getting started with TidyPaper on a Mac

TidyPaper is a free app for Mac that opens, signs, fills in and fixes PDFs and Word documents - and can explain any document in plain English. Pages 1 and 2 show how to install it; after that, everything it can do.

It needs a Mac with an Apple chip (M1 or newer) and macOS 13 Ventura or later (Apple menu, **About This Mac**).

1. Download TidyPaper

Open the link you were sent. A **download link** starts the download straight away; an **invitation link** opens a page - click **Download the Mac version** there. Either way you get **TidyPaper-....dmg** (about 100 MB) in your **Downloads** folder.

2. Install it

Double-click the **.dmg** file in **Downloads**. A window opens with TidyPaper and an **Applications** folder: **drag TidyPaper onto Applications**. Then close that window and, in Finder's sidebar, click the eject button next to **TidyPaper**.

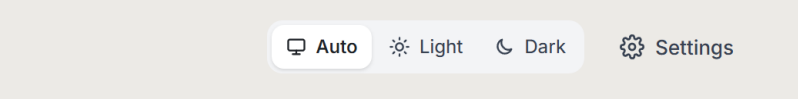
Open **Applications** and double-click **TidyPaper**. The first time, your Mac asks **"Are you sure you want to open it?"** - click **Open**.

> If it says **"TidyPaper" can't be opened** instead: click **Done**, open the Apple menu, **System Settings**, **Privacy & Security**, scroll down and click **Open Anyway** next to TidyPaper. It's only asked once.

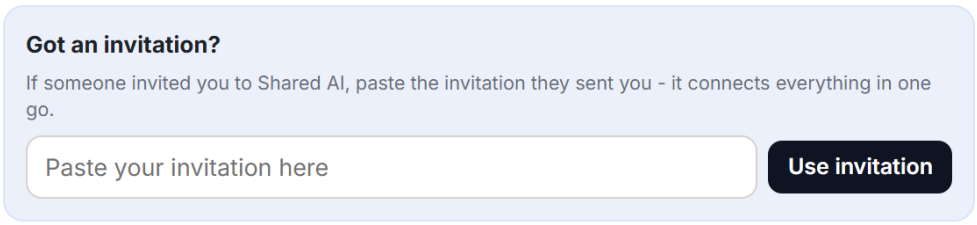
Tip: while TidyPaper is open, right-click its icon in the Dock and choose **Options**, **Keep in Dock**. Reading scanned pages and the video and audio tools come built in - nothing else to install.

3. Connect Shared AI (if you have an invitation)

On your invitation page click **Copy my invitation**. In TidyPaper, click **Settings** at the top right:



Paste it (**Command + V**) into **Got an invitation?** and click **Use invitation**:



> TidyPaper says **Connected as** your name and shows how much of this month's allowance is left.

Your Mac may ask whether TidyPaper can use your **keychain** (where it keeps the invitation safely): type your Mac password and click **Always Allow**. No invitation? Everything except Ask works without one.

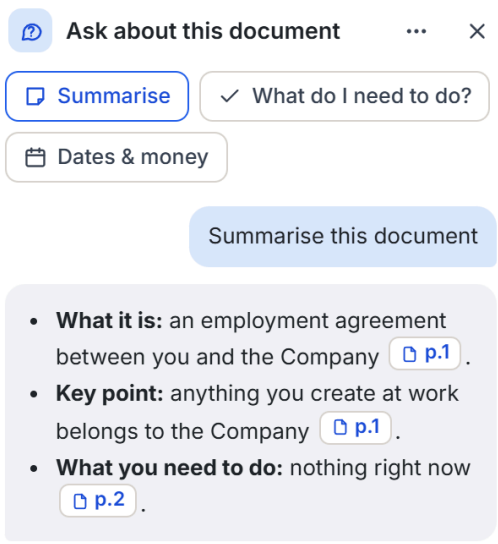
4. Try it

Open a PDF or a Word document - drag it onto the TidyPaper window, or click **Choose a file...**. Then click **Ask** at the top and choose **Summarise**, **What do I need to do?** or **Dates & money** - or type your own question.

Each answer shows page numbers like **p.2**. Click one to jump to that page and see the exact words - AI can get things wrong, so check anything important.

For a harder question, click **Think it through** under the answer: it takes a little longer and looks more carefully.

The first time, TidyPaper shows you exactly which pages will be sent before anything leaves your Mac.



Good to know

- Your invitation is **personal**. Please don't share it - if it's ever lost, ask for a new one (the old one then stops working).

- A document's text is only sent when **you** ask about it, and never anywhere except Shared AI.

- If TidyPaper says **"This month's AI allowance is used up"**, it starts again on the 1st. Everything else in TidyPaper keeps working.

- TidyPaper never overwrites your original files - edited, signed or smaller copies are saved next to them with a clear name.

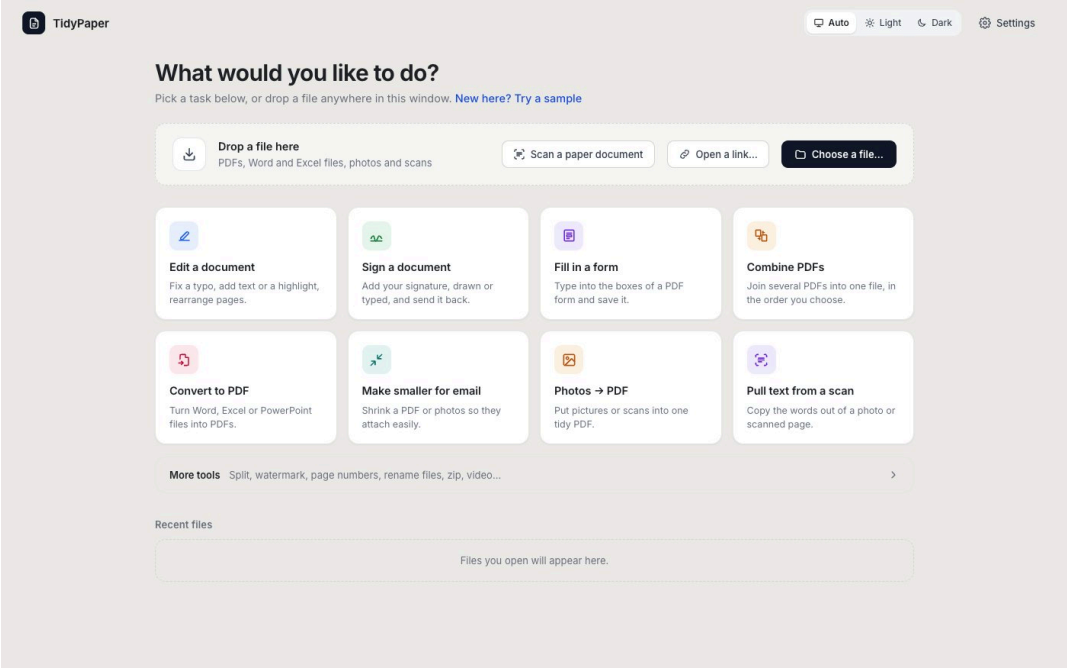
- When there's a new version, TidyPaper tells you with a **Get it** button. Open the new .dmg and drag TidyPaper onto Applications again - choose **Replace**.

Stuck? Ask: _____ **Phone:** _____

What you can do with TidyPaper

Everything here works on your Mac, without the internet - only Ask needs Shared AI.

The home screen

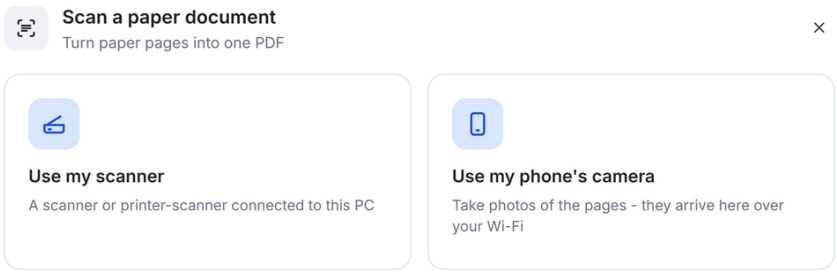


Open a file: drag it onto the window, or click **Choose a file...**. TidyPaper opens PDFs, Word, Excel and PowerPoint files, text and CSV files, photos and e-books. Anything that isn't a PDF opens as a PDF copy - when you save, you get **Name_edited.pdf** next to the original.

From Finder: right-click a file, choose **Open With** and pick **TidyPaper**. (To always open PDFs in TidyPaper: choose **Get Info**, pick TidyPaper under **Open with** and click **Change All**.)

The **eight big buttons** are the everyday jobs; **More tools** has the rest (listed at the end of this guide). **Recent files** brings back what you opened last, and **Auto** / **Light** / **Dark** at the top changes the colours.

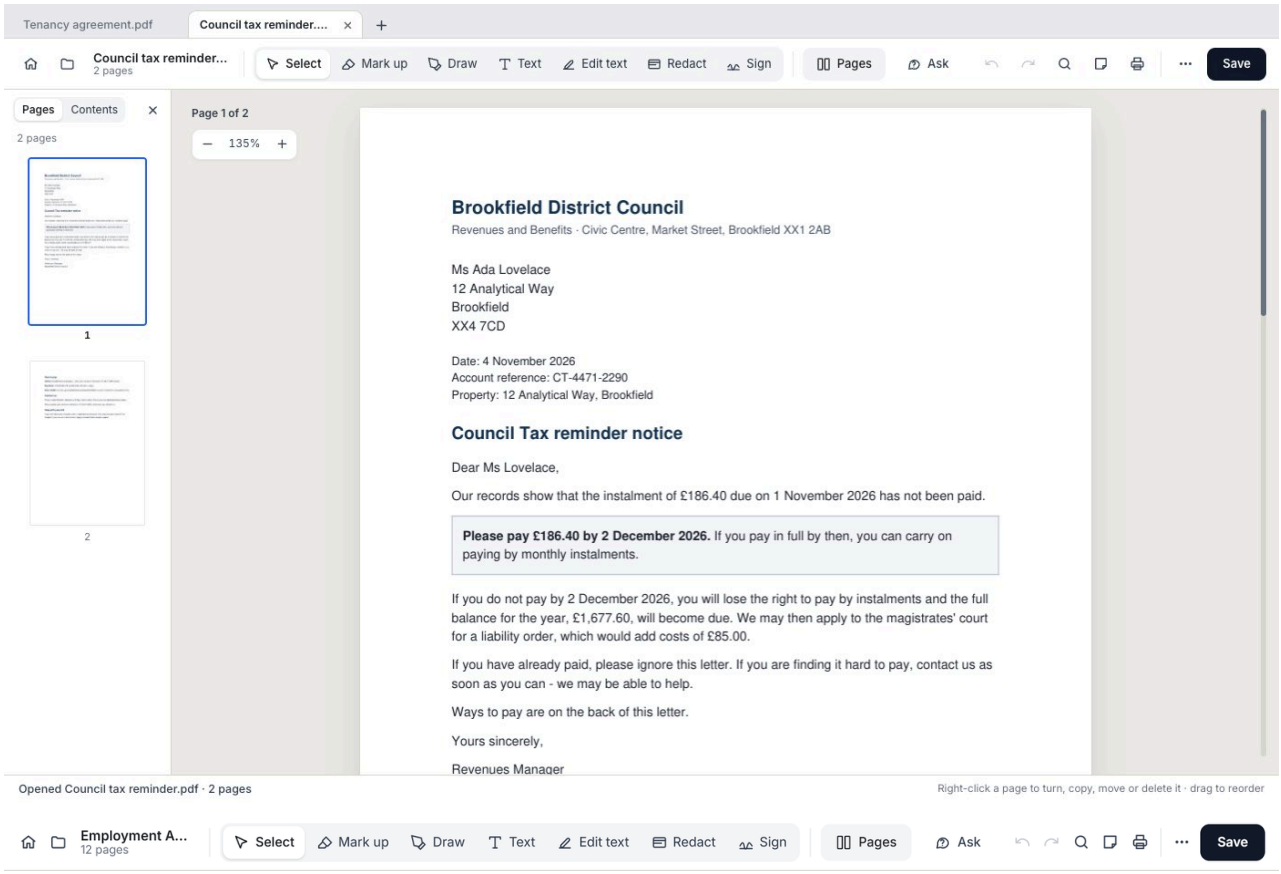
Scan a paper document



Click **Scan a paper document** on the home screen. **Use my phone's camera** shows a QR code: point your phone's camera at it, take a photo of each page, and the pages arrive in TidyPaper (your phone needs to be on the same Wi-Fi). Put the pages in order, then make one PDF.

The editor

Open a document and it fills the window: the pages on the left, the tools along the top.



Select	Click a box on a form to type in it (Tab moves to the next box). Pick out words to copy them.
Mark up	Highlight, underline or strike through words.
Draw	A pen, boxes, lines and arrows.
Text	Add a text box, a sticky note, a picture or a link.
Edit text	Change the document's own words - fix a typo, a name or a date.
Redact	Remove words or areas for good - they're gone, not just covered up.
Sign	Add your signature, drawn or typed - or a digital signature.
Pages	Show or hide the page list. Drag a page to move it. Right-click a page to turn, copy, crop or delete it, add a blank page, put in pages from another file, or save one page as a PDF or a picture.
Ask	Ask Shared AI about the document (see below).
Small buttons	Undo and redo (Command+Z, Shift+Command+Z), find words (Command+F), a list of every comment and mark, and print (Command+P).
Save	Save your changes (Command+S).
Zoom	The - and + buttons beside the page. Click the percentage to fit the page to the window or to show two pages side by side.

The ... menu (top right)

Save a copy as... - save under a new name or in another folder.

Print... and **Email this document...** - email opens Mail (or Outlook) with the PDF already attached.

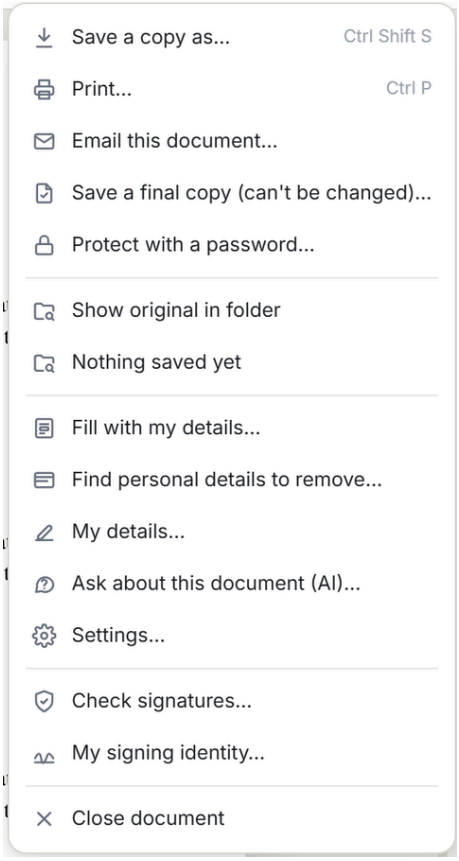
Save a final copy (can't be changed) - for sending a finished document.

Protect with a password - only people with the password can open the copy. A locked PDF you've opened can be saved without its password.

Fill with my details - fills your name, address and so on into a form. Set them once in **Settings**, **My details**; they stay in your Mac's keychain.

Find personal details to remove - finds things like phone numbers and email addresses so you can redact them before sharing.

Check signatures - shows whether the digital signatures in a PDF are genuine. **My signing identity** - your digital signature and your drawn or typed signature.



Ask about a document (Shared AI)

Click **Ask** in the editor. Pick **Summarise**, **What do I need to do?** or **Dates & money**, or type any question, such as "Can I cancel early?". Answers point to their pages (**p.2**) - click one to see the words yourself.

Think it through under an answer asks again more carefully. To **copy** an answer, select its words and press Command+C, or right-click it and choose **Copy this answer**.

The top of the panel shows how much of this month's allowance is left. It needs an invitation (step 3), or your own AI account in Settings.

More tools

On the home screen, click **More tools**, pick one and choose your files. The result is saved next to them - your files aren't changed.

PDF

Take pages out of a PDF	Save some pages as a new PDF, or every page as its own file.
Stamp a watermark	Write DRAFT, COPY or CONFIDENTIAL across every page.
Number the pages	Add 'Page 1 of 10' to the bottom of every page.

PDF to Word or Excel	Turn a PDF back into a file you can edit. Best for PDFs made from documents, not scans. Needs the free add-on LibreOffice if Microsoft Office isn't installed.
Pictures	
Change picture format or size	Turn iPhone HEIC photos into JPG, or make pictures smaller.
Make a QR code	Turn a web address or some text into a QR code picture.
Spreadsheets	
Excel to CSV	Save every sheet of a workbook as its own CSV file.
CSV to Excel	Turn CSV files into proper Excel workbooks.
Files & folders	
Rename many files	Add text, number them or tidy their names - you see the result first.
Tidy a folder	Sort loose files into Pictures, Documents, Installers and more.
Find duplicate files	Find identical copies taking up space. Nothing is deleted.
Zip files	Pack files or folders into one .zip to send.
Unzip	Unpack a .zip into a folder next to it.
Video & audio	
Convert video or audio	Make a video play anywhere (MP4), or keep just the sound (MP3). Needs the free add-on FFmpeg.
Cut a clip	Keep just part of a video or song, without losing quality. Needs the free add-on FFmpeg.
Text	
Clean up text	Remove tracking from links, fix capitals, sort or de-duplicate lines.

Free add-ons

Reading scanned pages (Tesseract) and the video and audio tools (FFmpeg) come built into the Mac version. Opening Word, Excel and PowerPoint files with their layout and pictures needs the free **LibreOffice** (libreoffice.org, about 350 MB) - without it, TidyPaper shows just their words.