

TeamFlow - Help Guide & Demo Walkthrough

Version: Review build with task-planning assistant

Updated: October 12, 2026

Audience: People reviewing the demo, team members, and portfolio reviewers

1. What is TeamFlow?

TeamFlow is a project management application for organizing work inside team workspaces. Users create projects, assign tasks, track progress, and review activity. Its task planner lets users describe a goal, review proposed tasks, and approve the tasks they want to create.

The project uses the MERN stack: MongoDB for data, Express and Node.js for the API, and React for the interface. It is intended to demonstrate backend engineering through workspace isolation, permission checks, session authentication, validation, and AI integration.

Open the review demo:

[Open the private TeamFlow review demo](#)

The review site is private and may require the owner's ChatGPT account.

2. Demo mode versus the complete application

Capability	Hosted demo	MERN application with configured services
Projects and tasks	Sample records, editable locally	API-backed records stored in MongoDB
Task board and list	Available	Available
Team membership and roles	Simulated using sample members	Enforced by the backend
Registration and sign-in	Requires a separate working API; unavailable on the static demo	Implemented in the Express API
Generate task plan	Local sample template; no model call	Calls the configured AI provider
Save approved suggestions	Adds tasks to browser-local demo data	Saves tasks through the API
Shared collaboration	Each browser has its own demo state	Users access their authorized workspace records

The hosted demo does not demonstrate live AI inference or live MongoDB persistence. Backend code is implemented, but live-provider and database workflows have not yet been verified. Demo interactions are not proof that server-side permissions have passed integration testing.

3. Find your way around

Area	Purpose
Project board	View the selected project's tasks by workflow status.
All projects	Browse projects and open their boards.
Team members	View members and their workspace roles.
Activity log	Review recent task, project, and membership changes.
Your projects	Quickly switch to another project from the sidebar.
New task	Create a task in the current project.
Generate task plan	Open the planning assistant.
Board / List	Switch between columns and a table.
Search tasks	Find tasks by words in their titles.
All priorities	Filter to high, medium, or low priority.
Reset demo	Restore the original sample workspace after confirmation.

The summary cards show total tasks, tasks in progress, completed tasks, and completion percentage. These numbers follow the current search and priority filters.

4. Create and manage tasks

Create a task

1. Open a project, such as **Platform launch**.
2. Click **New task**, or **Add task** in a board column.
3. Enter a title and, optionally, a description.
4. Choose a status and priority.
5. Select a workspace member to assign the task, or leave it unassigned.
6. Add a due date if needed.
7. Click **Save task**.

Update a task

Click a task card or a row in List view. Edit the fields and save. A task title is required.

Move work through the board

The statuses are **To do**, **In progress**, **In review**, and **Done**. Drag a task into another column, or open its editor and change Status. Use the editor as an alternative when dragging is inconvenient.

Delete a task

Owners and admins can open a task, click **Delete task**, and confirm. Members cannot delete tasks through the backend. The hosted demo starts as a simulated owner.

5. Use the task planner

1. Open the project where the tasks should be created.
2. Click **Generate task plan**.
3. Describe a goal in 15-3,000 characters. For example:
Build an e-commerce backend with authentication, products, orders, and payments.
4. In the hosted demo, click **Preview sample plan**. In the live application, click **Generate task plan**.
5. Review the summary and proposed tasks.
6. Edit titles, descriptions, priorities, and due dates.
7. Uncheck tasks you do not want to create.
8. Click **Approve & add tasks**.

Only selected tasks are added. New tasks start in **To do**, with no assignee. Assign them afterward using the task editor.

Generating or previewing a plan does not create tasks. Close the planner to cancel before approval. **Start over** returns to goal entry.

In demo mode, the plan is a reusable sample template, not an AI interpretation of the goal. The goal is included in the sample context, but the suggested workflow remains template-based.

In live mode, the AI receives the entered goal and the current project's name and description. It does not receive member emails, other projects, or existing task records. AI suggestions should be checked for relevance and feasibility before approval. Dates are optional; include actual calendar dates in your goal when requesting deadlines.

Pending live plans expire after 24 hours and can be approved only by the user who generated them. The first approved selection is fixed, so retries use that selection rather than adding a different batch.

6. Projects, members, and permissions

Create a project using **New project** on the All projects page. Enter a name and description, then save. Project creation requires owner or admin permissions in the live application.

Use **Add member** on the Team members page to add someone by email. For the live application, that person must have registered an account first. This version does not send an email invitation.

Action	Owner	Admin	Member
View projects, tasks, members, and activity	Yes	Yes	Yes
Create or edit tasks; generate and approve own plans	Yes	Yes	Yes
Create projects and add registered members	Yes	Yes	No
Delete tasks	Yes	Yes	No
Change member/admin roles	Yes	No	No

On the Team members page, an owner can change a non-owner's role using the role selector. The role endpoint cannot demote an owner. Backend queries check workspace membership and restrict access to the requested organization's records.

7. A three-minute demo walkthrough

Use this sequence when demonstrating the project. It is a suggested presentation, not a claim that live integration testing has been completed.

Time	What to show	Suggested explanation
0:00-0:20	Project board and Demo mode badge	"TeamFlow organizes a team's work in separate workspaces. This preview uses sample data saved in this browser."
0:20-0:45	Open a card; change priority or assignee	"Each task has a status, priority, assignee, description, and deadline."
0:45-1:05	Move a card, switch to List, search its title	"The same tasks can be managed from a board or a list, with search and priority filtering."
1:05-1:50	Enter the e-commerce goal; preview suggestions	"The planner proposes a task breakdown. This hosted preview uses a sample template; the MERN backend includes the real provider integration."
1:50-2:15	Edit a title; deselect two tasks; approve four	"Users stay in control: nothing is added until they approve their selected tasks."
2:15-2:40	Show the new tasks and Activity log	"Approved tasks enter To do, and workspace activity records the change."
2:40-3:00	Show Team members	"The backend implements owner, admin, and member permissions. Live permission enforcement needs the configured server."

The separate 48-second demo video is an **animated walkthrough**, not a screen recording. It has English captions, no voiceover, and identifies its sample data.

8. Troubleshooting

Issue	What to do
Sign-in does not work on the review site	Use the interactive demo. Real accounts need the running Express API and MongoDB.
The sample plan looks similar for different goals	Expected: the hosted preview uses a local template rather than a model.
Tasks seem to be missing	Clear the title search, set priority to All priorities, and check the selected project.
Another person cannot see my demo changes	Expected: demo changes belong to this browser, not a shared database.
Demo changes disappeared	Browser storage may have been cleared or a different browser/profile used.
A member cannot create projects or delete tasks	That action requires an owner or admin role.
Adding a live member fails	Confirm that they registered and that their account email is correct.
"AI is not configured"	Configure the provider key and model on the server; do not enter a secret in the frontend.
AI times out or returns invalid output	Retry generation. Failed generation does not create project tasks.
Daily AI limit reached	The live backend allows 20 generation attempts per user per UTC day.
A live plan is expired	Generate and review a new plan.

Demo data is stored in localStorage. Refreshing normally keeps changes; **Reset demo** restores the samples. Pending planner edits are not persisted in the React interface across a refresh.

9. Current scope and verification

The source includes accounts, workspaces, registered-member onboarding, projects, task CRUD, board/list views, search, priority filtering, activity, and the AI planning integration.

Email invitations, password reset, project deletion, member removal, file uploads, real-time updates, AI workspace Q&A, and AI progress summaries are not implemented.

The frontend build and 11 automated backend/security tests passed. AI-provider tests use mocked responses. Live AI, MongoDB workflows, database concurrency, and end-to-end browser behavior remain unverified.

The frontend loads up to 100 tasks for a live project. The API supports pagination for larger datasets. Multi-task approval is retryable rather than transactional, and audit logging can be incomplete across failures.

10. Developer handoff

The source README contains local setup commands, environment configuration, API routes, architecture, and AI request limits. To run the complete app, configure MongoDB, start the Express server, and launch the React client. Real AI additionally requires `OPENROUTER_API_KEY` and `AI_MODEL` in the server environment.

The project ZIP remains withheld until the user approves its delivery. This help guide can be reviewed independently of the source package.