

Orchid **AI** Advisors



Client Portal User Guide

How to find your way around your portal, complete your forms, share files with Orchid AI Advisors, and stay in touch — plus what your account can and cannot do.

For Clients

1 Who this guide is for

You are a **Client** — a team member working with Orchid AI Advisors. Your portal is your personal workspace: it shows **only your own forms, files, and messages**. You don't manage other people; your organization's administrator does that.

In short: you complete the forms assigned to you, view and download files Orchid shares, send files back, discuss your answers, and message the Orchid team.

2 Signing in

1. **Find your invitation email** from Orchid AI Advisors (or from your organization's administrator). It has a secure link to set up your account.
2. **Click the link and create a password.** The link is single-use and expires after a few days — if it lapses, ask for a new one.
3. **Sign in** with your email and password. You'll arrive at your **portal**, titled with your organization's name.

Forgot your password? Use "Change password" in the top bar once signed in, or the reset option on the login page. For your security, Orchid staff can never see or set your password for you.

3 Finding your way around

Your portal has a **menu down the left side** that is always visible. Items are grouped under headings, and clicking one opens it in a panel over your dashboard. Your home screen shows a "Share a testimonial" box on the right.

- › A small **red number** on a menu item means something new is waiting for you — for example, a newly assigned form or file you haven't opened yet. It clears once you open it.
- › On a phone or narrow screen, the menu moves to the top and your content sits below it.

4 The menu, section by section

YOUR ASSIGNMENTS

Questions for you — The forms assigned to you. Open one to answer it **one question at a time**; you can even use **voice input** instead of typing. On any question you can also **attach files** and **add one or more relevant web links**. A counter shows your progress ("Question 3 of 8 · 5 answered").

Voice Q&A (hands-free) — Prefer to listen and speak? Turn on  **Voice Q&A** — the toggle at the **top of each question card** (it gently pulses so you can spot it). Each question (and its choices) is then **read aloud** as it appears, and the microphone **starts automatically** so you can answer by speaking. Switch it off any time; your choice is remembered.

Save & continue later — Your progress is saved automatically as you go, and you can save on purpose with a button. A part-finished form shows as **"In progress / Continue."** Nobody sees your answers until you actually submit.

"Conflicting information" forms — Occasionally two descriptions of the same thing in your organization's information don't match. Orchid may send you a short **"Conflicting information"** form that simply asks **which description is current** — pick the one that matches how things work today (or choose **"Something else"** and describe it), with an optional box to explain any difference. It's an ordinary form you fill in the same way; it just helps us keep your organization's picture accurate.

Interviews — Sometimes Orchid asks you to do a short **interview with Remy, a friendly AI assistant**, about your role and day-to-day work, to find ways technology could make your job easier. It's a chat — each message is labelled with **Remy's name or yours** — that starts by **confirming your name, business email, and role** and explaining the ground rules (first time only), then it's one question at a time. When you begin for the first time, a short  **guided tour** plays automatically to show you around (you can skip or replay it anytime). The interview moves through a set of **short topics** (about a dozen), and a **progress bar** at the top of the chat shows the current topic and how far along you are (for example, "Topic 4 of 12"). Before moving on, Remy checks whether there's **anything more you'd like to add**, and it may **recap what it understood and ask you to confirm** — that's normal. You can **pause anytime** — it resumes exactly where you left off, without repeating the introduction. **It works like a phone call:** questions are read aloud in a natural voice and you can answer by speaking — the  Voice toggle at the top of the chat **turns Remy's voice off (or back on) anytime**, and typing is always fine. **Answers aren't sent automatically:** speaking or typing fills in the answer box, and you **press Send** when you're happy with it. Need to **fix an earlier answer**? Just tell Remy — or use "Edit my answers" on your summary page after you finish. You can also **paste web links** into the answer box and **upload documents or photos of forms** with the  button (they're read right on your own device before anything is sent). Forget any of this mid-interview? The  **Instructions button** at the top of the chat replays Remy's guidelines anytime, and the  **Tour button** right beside it plays a short, narrated walkthrough of everything on screen — during and after the interview. If we ever have to pause briefly for a technical reason, your progress is saved and Orchid will **email you a link to continue** — you'll never lose your place. You can share whatever helps, including forms and figures — anything personal, health-related or financial is automatically replaced with realistic stand-ins on your own device before it's sent, so your real details never leave your device and are never stored. If you ever **step away mid-chat**, Remy gently checks in and then **saves your place** so you can carry on later — nothing is lost. When

you finish you'll get a **summary** (here and by email) that you can comment on, and you can revise any answer, reopen a topic, or **add more to your interview** anytime — choose “Add more to my interview” and Remy will invite anything else and keep listening for as long as you like.

A short form after your interview — During the chat Remy digs into each idea you raise, but rather than keep you talking while you spell out every last detail, it **saves the remaining detail questions for a short form afterwards** — you'll see it called “**Use-case details.**” Remy mentions at the end of the interview that it's on its way. It reaches you the **normal way**: an Orchid colleague reviews it first and assigns it to you, you get the **usual assignment email**, and you fill it in under **Questions for you** like any other form — nothing is ever sent to you automatically. Once you submit, Remy reads your answers, and if something important is still unclear you may get **one more short round** of questions; this stops as soon as things are clear, so it's only ever a round or two. While Orchid waits for those answers, your interview may show the status “**Follow-up form**” — that simply means the conversation itself is finished and only the last details are outstanding. **Your summary is already there** in the meantime. The same protection applies as in the interview: anything personal, health-related or financial is replaced with realistic stand-ins before it reaches the AI.

Files from Orchid AI Advisors — Files shared with you — by Orchid or by your organization's administrator. You can **view them in the browser and download a copy**.

Upload files & folders — Send files, a whole folder, or a note to Orchid (up to 50 MB per file; larger files resume automatically if your connection drops).

Files you sent — A history of everything you've already sent to Orchid — open any item to view or download it. Next to each file is a **Drop** button: if you shared a file by mistake or no longer want it considered, Drop removes that **one file** and clears anything it added to Orchid's understanding of your organization. It's **permanent** (you'll be asked to confirm), and it's separate from **Retract**, which takes back a whole submission.

SUBMITTED FORMS

Submitted Forms — The forms you've completed. Open one to **view or edit your answers**, or to **discuss it with Orchid one question at a time**.

5 Discussing your answers with Orchid

Inside a submitted form, each question has a “**View Response**” button that opens a small chat box. There you'll see your answer followed by a back-and-forth conversation with Orchid. You can type or **dictate with your voice**, and attach files. The chat box also has the  **Voice Q&A** toggle — turn it on to have the question and your answer **read aloud** before the microphone starts. A **red dot** means there's an unread message; a grey double-check means both sides have read it.

6 Testimonials & feedback

Share a testimonial

On the right of your dashboard you can write a short testimonial about working with Orchid. The **star rating starts at 5** and the **consent box is already ticked** — adjust either before submitting. Orchid reviews testimonials before they're published.

Share feedback

Share Feedback opens a private, ongoing conversation with the Orchid team, like a chat. A red badge appears when Orchid has replied. You can **edit or delete the messages you wrote**; Orchid's replies are read-only to you, and an edited message is marked "edited."

Ask an Admin

The **Ask an Admin** bubble in the corner of your screen is a quick way to ask Orchid a question and get a real answer from an admin. **This isn't a live chat** — it's not Remy or any AI, and no one is watching it in real time. The moment you send a message, **an Orchid admin is notified right away** and replies here when they're available. It's separate from Share Feedback. Messages here are kept as a record and can't be edited or deleted.

You can **attach a file** to a message using the 📎 button. When an admin replies, you'll get an email from **contact@orchidaiadvisors.com** — you can simply **reply to that email** and your reply is added to the same conversation, or open the bubble next time you're signed in. Keep the reference tag in the email's subject line so we can match your reply to the right conversation.

7 What you can and cannot do

	AS A CLIENT
✓	Fill out the forms assigned to you , save a draft, and submit when ready
✓	Re-open a submitted form to view or edit your answers
✓	View and download files shared with you
✓	Send files, folders, or notes to Orchid
✓	Discuss each answer with Orchid (chat, voice, and attachments)
✓	Do an AI interview assigned to you — pause/resume, voice, uploads; then comment on and improve your summary
✓	Complete the short "Use-case details" form Orchid sends after your interview (and a second short round if anything's still unclear)
✓	Leave a testimonial and exchange feedback (editing or deleting your own messages); use Ask an Admin for a quick question
✗	See other team members' data — your portal shows only your own (interviews included)
✗	Add or manage users , or assign forms and files — that's your organization's administrator
✗	Create or change forms or the question library — Orchid builds those
✗	Open the administrator or Orchid staff consoles

Your privacy: a draft you haven't submitted is private to you — it won't appear to Orchid or your administrator until you submit it.

8 Getting help

Stuck or have a question? Use the **Ask an Admin** bubble for a quick clarification (not a live chat — an admin is notified right away and replies when available), **Share Feedback** in the menu for anything less urgent, or reply to any email from Orchid AI Advisors. We're glad to help.