HQ help: the whole guide

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What HQ does, in two minutes

HQ answers your customers, books the work with your team, and carries each job through to being paid.

Steps

1. A customer texts your HQ number, calls it, or uses the chat on your website.
2. HQ asks what they need and how urgent it is, and offers real times from your team's real hours.
3. A technician accepts the job. Nothing is confirmed to the customer until they do.
4. The job carries on in one place: the Quote, the visit, photos, the invoice and the payment.

Good to know

Customers never install an app or make an account. They text, chat or call, and read plain web pages you send them.

Nothing happens on its own. HQ and Orsa can suggest and draft, but a person on your team approves every booking, message and change.

You can switch features on and off for your company, and the plain screens always work, even with the AI switched off.

Finding things, and the bell

The bar across the top of HQ searches everything you may see, and the bell keeps everything meant for you.

Steps

1. Type a job number, a name, a phone number, a Quote or an invoice number in the search box at the top.
2. Press a result to open it.
3. Press the bell to see what came in for you: jobs, answers, mentions and more. The red number is how many are new.

Good to know

Search only finds what your role may open. A technician finds their own jobs.

Screens update by themselves when something changes, so there is nothing to refresh.

https://orshihq.com/help/search-and-bell

Configure: setting up your company

Owners and managers set the company up under Configure, at the top of HQ. Everyday work stays in the menu on the left.

Steps

1. Press Configure at the top of HQ.
2. Pick a section from the menu on the left: your team, services, the company, texting, payments and more.
3. When you are done, press Back to HQ at the top of the menu.

Good to know

Only owners and managers see Configure. Everybody's own settings are in Your profile, under their initials.

You can also ask Orsa to change a setting. It shows what would change and waits for Confirm.

https://orshihq.com/help/configure

Signing up

Start your company at orshihq.com/start. It takes about ten minutes, and you can stop and come back.

Steps

1. Go to orshihq.com/start and press Start your company.
2. Answer one question per page: your company name, what you do, the number customers call, your time zone, your name and your email.
3. Say whether you go on jobs yourself or run the office.
4. Check your email and choose a password from the link we send.

Good to know

Every page has a short line saying why we ask, and an i you can tap for more.

Nothing is texted to anybody while you sign up. Your texting is switched on later, once the phone carriers approve it.

Trying HQ with your own demo company

Make a free account and get a company of your own to try, filled with sample customers, jobs and a team.

Steps

1. Go to orshihq.com and press Try the demo.
2. Make a free account with Google, Microsoft or your email, and press Make my account.
3. Your own demo company opens. Book jobs, send Quotes, ask Orsa and change anything you like.
4. When you are ready, press Sign up and keep my setup. Your services, prices, team, hours and settings move into a real company.

Good to know

A demo lasts 14 days. At the end of the last day, Pacific time, everything in it is wiped, unless you sign up.

Nothing in a demo reaches a real phone, inbox or card. Its texts, emails and payments are only pretend.

The sample customers and jobs stay behind when you sign up, so your real company starts clean.

The setup steps, and why we ask

After you sign up, nine short steps get your company ready: trade, services, area, hours, your HQ number, calls, quiet hours, texting and Google.

Steps

1. Open Configure, then Setting up, or press the card on your home screen.
2. Work through each step and press Save. Orsa looks at each answer and says whether it is thorough, good or incomplete, and why.
3. Skip a step if you need to. Everything you saved is kept, so you can come back any time.
4. When Orsa says something is missing, fix it there or come back to it later.

Good to know

Your trade picks a starter list of services. Your area decides which customers you serve. Your hours decide which times customers are offered.

Quiet hours have no default. You choose no quiet hours, or the hours when nothing is texted.

The texting step collects what the phone carriers need to approve your texting. Orsa can draft the three hardest answers for you to edit.

Setting up by talking to Orsa

Instead of the setup pages, you can tell Orsa about your company in your own words, typed or spoken.

Steps

1. Open Setting up and choose Just talk to Orsa.
2. Talk about your business as long as you like: what you do, where, when you are open, what you charge.
3. Orsa turns what you said into cards, one per setting, and asks about anything still missing.
4. Read each card and press Save on the ones that are right. Nothing is saved until you do.

Good to know

You can switch back to the setup pages at any time. Anything you saved by talking shows there too.

Prices are written down exactly as you said them. HQ’s price book does any arithmetic, never the AI.

Everything you save is recorded under your name in the history of changes.

Bringing your services, parts and team from a spreadsheet

Bring the lists you already keep into HQ, or change what is here in Excel and bring it back.

Steps

1. Open Configure, then Import / update lists.
2. Pick the list: services, parts or technicians. Choose an Excel or CSV file, or paste the rows straight from Excel or Google Sheets.
3. Press Import / update lists and look at what would be added or changed. Nothing changes until you say so.
4. Press Confirm. Changed your mind? Press Take it back.

Good to know

To change many prices at once, press Download as Excel, change the file, and bring it back in. What is already here is updated.

Customers have their own place: Customers, then Add customers.

Your HQ number and texting approval

Customers text and call your HQ number. Before any text can go out, the phone carriers have to approve your company, and you send that request yourself from HQ.

Steps

1. Open Configure, then This company, and find Texting your customers. If you have no HQ number yet, press Show numbers and Take this one.
2. Fill in what the carriers ask for: your legal name, your EIN, your website and how customers agree to be texted. Press Save these details.
3. If HQ says your wording does not match what it really sends, press Use HQ's own wording.
4. Press Send it to the carriers. The button only works once everything it needs is there.
5. Watch your email. When the carriers approve, your texting turns on by itself. If they say no, their words are shown: fix those answers and press Send it again.

Good to know

Carriers in the US will not deliver business texts until the business is registered. This protects customers from spam, and it is the same for every company.

Approval usually takes 10 to 15 days. While you wait, customers can still call you and use the chat on your website.

Your legal name has to match your EIN letter exactly, including LLC or Inc. A mismatch is the most common reason for a refusal.

Bringing the number you already have

Your customers already know your number. You can move it to HQ instead of taking a new one.

Steps

1. Open Configure, then This company, and under Your HQ number open Or bring the number you already have.
2. Read what moving a number risks. Fill in the number, whose line it is, its phone company and the name on the account, and press Ask head office to bring it.
3. Then fill in the move: the account number and PIN from your phone bill, the address on the bill, who signs, and a copy of the bill. Tick that you understand, and press Send the move.
4. Watch your email for a letter from Twilio to sign. HQ checks every hour and emails you when the number has arrived.

Good to know

A new number works in a day and leaves your phone as it is, so it is the quicker choice. Moving a number takes longer.

The number may not work for a short while during the move, and a cell number moved to HQ stops working on that phone.

The account number and PIN go straight to Twilio, the company that moves the number. HQ does not keep them.

Texting new customers your contact card

After a new customer's first text or call, HQ texts them your contact card once, so your number is saved under your name on their phone.

Steps

1. Open Configure, then This company.
2. Tick or untick Text new customers your contact card, and press Save. It is on unless you turn it off.

Good to know

The card goes once to each phone number, after the customer says yes to texts: by text, on a call, in your website chat, or when the office takes a job by phone.

It holds your company's name, your HQ number and your website. Never your address.

It follows the same rules as every other text: quiet hours, STOP, and the carriers' approval. Until the carriers approve your texting, no card goes.

Ready to go live, line by line

Ready to go live lists everything that must be in place before your texts reach real phones.

Steps

1. Open Configure, then Ready to go live.
2. Each line shows a check when it is done and says what to do when it is not.
3. Fix each line, then come back. The list updates on its own.

Good to know

The lines you need are: a real company (not the demo), somebody who runs it can sign in, a number customers can call, the towns or zip codes you cover, at least one service with a price, at least one technician with working hours, card payments with Stripe, a card on file for your plan, and texting approved by the carriers. Two more are recommended: your opening hours, and your customers brought over.

When the carriers approve your texting and every needed line is done, texting turns on by itself. If a line is still missing then, finish it and ask Orshi to switch texting on.

Getting paid: connecting Stripe

Customers pay you by card through Stripe. Your company is the merchant, and the money goes straight to your bank.

Steps

1. Open Configure, then Taking payments.
2. Press the button to set up payments. You go to Stripe’s own pages to give your business and bank details.
3. When you come back, HQ asks Stripe where things stand and shows anything still missing.
4. If Stripe asks for more, press Ask Stripe again after you have given it.

Good to know

Card details never touch HQ. Customers type them on Stripe’s page.

Stripe’s card fees are taken by Stripe from each payment. HQ never holds your customers’ money.

https://orshihq.com/help/connect-stripe

Your company color

Pick one color and every page your customers open uses it, with readable contrast worked out for you.

Steps

1. Open Configure, then This company.
2. Under Your color, pick the color you use on your van or cards, or leave it unticked to use the standard color.
3. Press Save.

Good to know

HQ works out the lighter and darker shades from your one color, and checks every pairing stays easy to read.

Your customers see your company name and color. They never see Orshi or HQ.

Your number on Google

If you have a Google Business Profile, change its phone number to your HQ number so callers reach HQ.

Steps

1. Open Setting up and go to the Google step.
2. Sign in to Google Business Profile in another tab and change the phone number to your HQ number.
3. Come back and press I've changed it, or I don't have a Google listing.

Good to know

HQ cannot change anything at Google for you. The step only records what you did, so Ready to go live can show it.

How customers reach you

Customers can text your HQ number, call it, or use the chat on your website. Every conversation lands in Conversations.

Steps

1. Open Conversations to see every conversation, newest first.
2. Open one to read everything the customer wrote and everything written back.
3. Press Reply to answer as a person. The assistant steps back while you do.

Good to know

Text and web chat run the same conversation, with the same questions and the same consent.

Calls are on the Calls screen, with who called, when, and what happened.

https://orshihq.com/help/how-customers-reach-you

What the assistant says to your customers

You can read and change the words a customer reads at each point of the conversation.

Steps

1. Open Configure, then What customers are sent.
2. Pick a message to see the words used now.
3. Change the words and press Save.

Good to know

Some wording is refused on purpose. For example, a message cannot say a job is booked before a technician has accepted it.

The consent question and STOP wording are fixed, because the phone carriers check them word for word.

Customers never see the name Orsa. Your texting assistant uses the name you give it, or just says it is your assistant.

Turning the assistant on or off, and naming it

The assistant that texts your customers can be switched off at any time, and you can give it a name customers see.

Steps

1. Open Features.
2. Find the AI switches and turn the customer assistant on or off.
3. To name it, open Setting up or tell Orsa the name you want it to use with customers.

Good to know

With the assistant off, customers get HQ's plain scripted questions instead, and everything still works.

A named assistant introduces itself as an AI assistant for your company, so customers always know they are talking to AI.

https://orshihq.com/help/assistant-on-off-and-name

Quiet hours

Quiet hours are times when nothing is texted to your customers. You choose whether to have them, and when.

Steps

1. Open Configure, then Quiet hours.
2. Choose No quiet hours, or set the time texts stop and the time they start again.
3. Press Save.

Good to know

Quiet hours are kept in each customer’s own time zone.

A text that would go out during quiet hours waits and goes at the end of them. That covers every kind of text, including review requests.

A customer who texts you during quiet hours still gets an answer, because they started the conversation.

https://orshihq.com/help/quiet-hours

Emergencies and the safety rules

Fixed safety rules spot gas, fire, flooding, carbon monoxide, electrical danger and a vulnerable person, in every language HQ speaks, for every trade.

Steps

1. When a rule fires, the customer gets the safety instruction first, before any other question.
2. The job is marked an emergency and the office is told right away.
3. Look at the emergency on the Team board. It says whether a safety rule caught it, the customer declared it, or the AI read it.

Good to know

Urgency can be raised and never lowered by the AI. A manager can lower it on the job, with a reason, and that is recorded.

HQ rates how urgent and how dangerous something is. It never tells a customer how to fix anything.

Consent, STOP and HELP

A customer is asked before any details are taken whether they agree to be texted, and can stop at any time.

Steps

1. The first reply asks the customer to agree, with the date, time and exact words recorded.
2. If they reply STOP, or the word for it in their own language (such as PARAR, ARRET, STOPP, SAIR, LEIRATKOZAS or TIGIL), texting stops for that number right away.
3. If they reply HELP, they get your company name and how to reach you.

Good to know

HQ is inbound only. Nobody can text a customer who did not contact you first.

Someone who writes something like "stop texting me" without the exact word is flagged to the office so a person can act on it.

Adding chat to your website

One line pasted into your website adds a chat button that runs the same conversation as a text.

Steps

1. Open Configure, then This company, and find The chat on your website.
2. Copy the line shown there.
3. Paste it into your website, just before the closing body tag. Your web designer can do this in a minute.

Good to know

What customers send in the chat lands in Conversations with everything else.

If the line ends up somewhere it should not, press Make a new key. The old line stops working until you paste the new one.

https://orshihq.com/help/web-chat

Calls: whisper, missed calls and the call log

When a customer calls your HQ number, HQ calls the right person first, and a missed caller is never left with nothing.

Steps

1. Open the Calls screen to see every call in and out.
2. When HQ calls you, you hear a short whisper first saying who is calling and why, before you are put through.
3. If nobody picks up, the caller chooses a text back or a voicemail, and the office gets a note.
4. Press Try a practice call to hear how it sounds.

Good to know

Each call shows who called, when, how long, and what happened.

Recording is off unless you switch it on in Configure, and callers always hear first that the call is recorded.

Business hours and after-hours answering

Your business hours decide who answers the phone. After hours you choose: whoever is on call, the assistant, or voicemail and a text.

Steps

1. Open Configure, then Phone calls.
2. Set your hours for each day, or use Copy to other days.
3. Choose who answers while you are open, and what happens after hours.
4. Press Save.

Good to know

An emergency can always go straight to a person if you choose it.

Quiet hours are separate. They only decide when texts go out.

Calling a customer from HQ

Call a customer from your company's number, so they see your HQ number and not your own cell.

Steps

1. Open the customer or the job and press Call from our number.
2. HQ calls your own phone first. Pick up, and HQ then calls the customer.
3. When you hang up, record what happened: Called them, Left a message or No answer.

Good to know

The call is logged on the Calls screen and on the customer.

If your company records calls, the customer hears the recording notice first.

How a job comes in

A customer asks for a time, a technician accepts, and only then is the job confirmed to the customer.

Steps

1. A customer picks a time in their conversation, or the office books one by phone.
2. The job is offered to a qualified technician who is free then.
3. The technician accepts or declines. A decline passes it on to someone else, or to the office if nobody is free.
4. When it is accepted, the customer is told the job is confirmed.

Good to know

Requests waiting on somebody are on the Requests screen.

If nobody answers in time, the job is escalated to a manager.

Approving a time

Times and changes that need a person are on the Requests screen, waiting for Approve or Deny.

Steps

1. Open Requests.
2. Open a request to see what is asked and what it would change.
3. Press Approve or Deny. You can add a short note.

Good to know

The person who asked is told your answer right away.

The office may confirm a job for a technician who has not answered. The technician is told, and it is recorded who confirmed it.

Booking a job by phone

Take a job by phone uses the same booking as a text, so a phoned-in job is treated the same as any other.

Steps

1. Open Take a job by phone.
2. Find the customer or add them, and write what they need in their words.
3. Press Find times, pick one with the customer, and press Book it.

Good to know

If the customer has not agreed to texts, nothing is texted to them. Read them the consent question on the phone if they want updates by text.

The times list the nearest free technician first, with about how much driving each one adds.

Moving or reassigning a job

Move a job to another time, or give it to another technician, from the job itself or the Team board.

Steps

1. Open the job from the Jobs list or the Team board.
2. Press Reschedule to pick a new time. To give it to someone else, press More on its row in the Jobs list, then Reassign.
3. Check what would change, then confirm.

Good to know

The customer is told about a new time. The technician who had it is told they no longer need to go.

You can also ask Orsa: "Move Maria’s job to Thursday at 2."

Routes: each technician’s day as a drive

Routes shows each technician’s stops in order, about how long each drive is, and a better order when there is one.

Steps

1. Open Routes and pick the day.
2. Each technician’s stops are in order, with about how many minutes of driving are between them. Press Open the whole day in maps for directions through every stop.
3. When a better order saves driving, it is shown beside the day. Press Use this order, or Not now.
4. Under Where the vans start the day, put your shop or yard address. Under Vans taken home, add a home address for anybody who starts from home.

Good to know

Nothing moves until you press Use this order. Then each customer is texted their new time, and the technician is told.

When you book a job, the nearest free technician is listed first, with about how much driving it adds.

HQ works out the drive times itself. A stop that is not on the map is left out of them.

https://orshihq.com/help/routes-and-better-order

Squeezing in an emergency

When an emergency needs someone now, HQ shows which job could move to make room, and why.

Steps

1. Open the emergency on the Team board.
2. Press What could move? to see the jobs that could make room, with the reason for each.
3. Pick one and confirm. Nothing moves until you do.

Good to know

The customer whose job moves is offered other times.

Emergencies waiting on a phone call are listed at the top of the Team board.

Crews and trainees

A job can need more than one technician, and an apprentice can ride along to learn without counting as one of them.

Steps

1. Open the service and set how many technicians it needs.
2. Each seat on the job is offered and accepted separately. The job is confirmed when every seat is filled.
3. To send an apprentice, add them as riding along with their trainer.

Good to know

A technician can ask to do a job with a different crew. The request waits for Approve on the Requests screen.

If a trainer comes off a job, the office decides what the apprentice does. Nothing is decided for you.

https://orshihq.com/help/crews-and-trainees

On-call

The on-call rotation says who is woken for an emergency out of hours.

Steps

1. Open Technicians, then On call.
2. Set the rotation: who is on call, and for which days and times.
3. Save it. The Team board shows who is on call right now.

Good to know

An emergency out of hours tells whoever is on call. If nobody is on the rotation, the office is told instead.

Callbacks within 30 days

A return visit for the same problem within 30 days of the first visit is a callback, and you are not charged for it.

Steps

1. When a customer comes back about earlier work, HQ flags it as a possible callback.
2. Open the job and press Yes, a callback, or No, a new job.
3. A callback is marked Return visit on the technician's day.

Good to know

The 30 days count from the first appointment and never restart.

Callbacks are counted per technician over time, so you can see patterns without a leaderboard.

https://orshihq.com/help/callbacks

Canceling a job

Cancel a job from the job itself. The customer and the technician are both told.

Steps

1. Open the job.
2. Press Cancel the job and choose the reason.
3. Confirm.

Good to know

The time is free again right away.

The reason is kept, with the customer’s own words if they gave any.

Comments on a job

Leave a note or ask the team something on the job itself. Type @ and a name to tell that person.

Steps

1. Open the job. On a computer, press its row in the Jobs list; it opens beside the list.
2. Under Comments, write your note. Type @ and pick a name to tell that person.
3. Leave it Internal for the team, or choose Customer-facing to also send it to the customer, then press Send comment.

Good to know

Somebody you mention is told in the bell. When somebody answers, everybody who commented before is told too.

Technicians see and write comments on their own jobs in the app. Orsa can read and add a comment too, after you confirm.

https://orshihq.com/help/job-comments

Adding a technician

Add a technician with their name, contact, the services they do and the hours they work.

Steps

1. Open Technicians and press Add a technician.
2. Fill in their name, phone, email and language, and tick the services they do.
3. Set their working hours. Use Copy to other days to save typing.
4. Press Invite them to sign in so they get the phone app.

Good to know

You can stop part way. A half-finished technician is kept as a draft until you come back.

Customers only ever see a technician’s first name.

https://orshihq.com/help/add-a-technician

Inviting an office person or bookkeeper

Office staff and bookkeepers sign in with their own accounts and see only what their role allows.

Steps

1. Open People and permissions.
2. Press Invite, enter their name and email, and pick their role.
3. They get an email with a link to choose a password.

Good to know

To stop someone signing in, open their row and remove them. Their past work stays, under their name.

If someone forgets their password, press Password reset link on their row.

https://orshihq.com/help/invite-office-person

Roles and what each one sees

Every company starts with four roles: Owner, Office, Technician and Bookkeeper. Each can see or change parts of HQ.

Steps

1. Open People and permissions, then What each role may do.
2. Pick a role to see each area and whether it can see it, change it, or neither.
3. Change what a role may do, or create a new role, and save.

Good to know

The Owner may always do everything.

Nobody can give anybody something they do not have themselves.

Orsa follows the same rules. It can only see and do what the person asking can.

Working hours and time off

Each technician has their own working hours, and time off is asked for and approved in HQ.

Steps

1. To change hours, open Technicians, pick the person, and change their hours.
2. A technician asks for time off from their phone app. It waits on the Requests screen.
3. Approve or Deny it. HQ checks it against your time-off rules first.

Good to know

Set your rules in Configure, then Time-off rules: how many days in a row, and how many people may be away at once.

HQ never sees or asks for the reason for time off.

A technician’s day on the phone app

Technicians work their day from the HQ app on their phone: today’s jobs, directions, photos and the end-of-day report.

Steps

1. Open the app to see Your day: the next job, the rest of the day, and the drive between.
2. Accept or decline jobs offered to you.
3. On each job, tap on my way, arrived, started and finished. The office sees it as it happens.
4. Take before and after photos. They send themselves when you have signal.

Good to know

Turn alerts on for your phone to be buzzed when a job is offered or changes.

You can ask Orsa from the app too: "What’s my next job?" or "Mark me finished."

https://orshihq.com/help/technician-day

The end-of-day report

At the end of the day each technician hands in a short report: what was done, parts used, and anything to come back for.

Steps

1. In the app, open End of day.
2. Fill in each job's boxes, or say it to Orsa and check what it wrote.
3. Press Hand it in.

Good to know

The office sees the reports under Technicians.

Orsa only copies what was said into the boxes. It never makes up work that was done.

When someone is out sick

Mark someone out and HQ shows which jobs need somebody, who else could take each one, and asks before changing anything.

Steps

1. Open Technicians, pick the person, and press Mark them out. Or tell Orsa: "Marcus is out until Thursday."
2. HQ lists the jobs that now need somebody, with today’s urgent work first.
3. For each job, pick Offer them the seat to give it to someone free, or Ask the customer to move it.

Good to know

Nothing changes until you confirm. Customers are never told why someone is away.

https://orshihq.com/help/someone-out-sick

Setting up your price book

Your price book holds your services, parts and labor rates. Every Quote and invoice is worked out from it.

Steps

1. Open Services to add the services you offer, or start from the list for your trade.
2. Open Prices to set what each service, part and labor rate costs you and what you charge.
3. Set your trip charge, after-hours rates and tax.

Good to know

The price book does all the arithmetic, in whole cents. The AI never works out a price.

A service with no price means the customer gets a Quote on site.

Prices more than six months old are flagged so you remember to check them.

https://orshihq.com/help/price-book

Margin and markup, with an example

Margin is the share of the price you keep. Markup is how much you add on top of your cost. They are not the same number.

Steps

1. Say a part costs you $100 and you charge $150.
2. Your markup is 50%, because you added $50 to the $100 cost.
3. Your margin is 33.33%, because $50 is a third of the $150 price.

Good to know

In Prices you can say which one you mean, and HQ works out the price from your cost.

If a price falls below your margin target, HQ flags it.

https://orshihq.com/help/margin-vs-markup

Making and sending a Quote

A Quote is a firm price the customer can accept online. It is built from your price book.

Steps

1. Open the job and start a Quote, or open Quotes.
2. Add services, parts and labor from your price book. HQ adds it up.
3. Check it and press Send. The customer gets a link to read it and say yes.

Good to know

Every Quote has an expiry date. A firm price with no end is a promise nobody can keep.

Once sent, a Quote is not edited in place. A change makes a new version.

https://orshihq.com/help/make-and-send-quote

Giving options on a Quote

Offer the customer choices on one Quote, such as repair or replace, and let them pick.

Steps

1. On the Quote, add each choice as an option with its own lines.
2. Send it. The customer sees each option with its price and picks one.

Good to know

Whichever option the customer picks is what goes on the job and later the invoice.

Deposits

Ask for a deposit when a customer accepts a Quote: a fixed amount or a percentage.

Steps

1. Open Prices and find A deposit when a quote is accepted.
2. Choose none, a fixed amount, or a percentage.
3. Save. Quotes sent from now on ask for it.

Good to know

The customer pays the deposit by card when they accept. Paying a deposit does not book the visit: a technician still has to take the job.

Changes on site

When the job turns out bigger, offer the customer a new version of the Quote from the job.

Steps

1. Open the job and press The job got bigger.
2. Add what is needed now.
3. Press Offer another version. The customer reads it and accepts it before you carry on.

Good to know

The first Quote is kept exactly as it was. Every version is on the job, so nobody argues later about what was agreed.

Letting Orsa draft a Quote

Orsa can draft a Quote from what the customer described, using only your own price book.

Steps

1. Open the job and press Draft it from this.
2. Orsa picks lines from your price book. The price book works out every figure.
3. Check every line, change anything, and send it yourself.

Good to know

Orsa never sends a Quote and never invents a price. If something is not in your price book, it says so.

https://orshihq.com/help/orsa-draft-quote

Sending an invoice

Send an invoice from the job when the work is done. The customer pays by card online.

Steps

1. Open the job and start the invoice. It starts from the accepted Quote.
2. Check the lines, the deposit already paid and the tax.
3. Press Send. The customer gets a link to read it and pay.

Good to know

Invoices are on the Invoices screen, with what is paid and what is still owed.

https://orshihq.com/help/send-invoice

Reminding a customer to pay

Send an unpaid invoice’s reminder from the invoice itself.

Steps

1. Open Invoices and pick the unpaid one.
2. Press Send a reminder. The customer gets the same link again.

Good to know

Reminders follow your quiet hours like every other text.

Refunds, and why the card fee isn’t returned

Give money back from the invoice. HQ shows you the card fee you lose before you confirm.

Steps

1. Open the invoice and press Give money back.
2. Choose how much and why.
3. Read the warning about the card fee, and confirm.

Good to know

When you refund, Stripe keeps the processing fee it took on the original payment. HQ shows roughly how much that was before you press the button.

The money goes back to the customer’s card. It can take a few days to appear.

Disputes

If a customer disputes a payment with their bank, you answer through Stripe, and HQ helps you gather the evidence.

Steps

1. Open Money to see the dispute and its deadline.
2. Open the job and download its photos as one PDF.
3. Upload that, with the signed Quote, on Stripe’s dispute page before the deadline.

Good to know

Photos are only shared when you choose to. Location and camera data were removed when they were taken.

When the money reaches your bank

Card payments go to your Stripe account and then to your bank on Stripe’s payout schedule.

Steps

1. Open Money to see what came in and what went out.
2. For payout dates, check your Stripe dashboard.

Good to know

HQ never holds your money. Your company is the merchant on every payment.

Bringing in customers from a spreadsheet

Bring your existing customers into HQ from Excel or a CSV file, or update the ones already here.

Steps

1. Open Customers, then Add customers.
2. Choose your file (Excel or CSV), or paste the rows, and match each column to a field: name, phone, email, address.
3. Press Look at it first to see what would be added or changed, then Bring them in.
4. Changed your mind? Press Take it back.

Good to know

Nobody you bring in is texted. Each customer is texted only after they agree to it.

People already in HQ are not added twice. They are matched by phone, email, or name and address, and you can choose to update them from the sheet. An empty cell never erases anything.

https://orshihq.com/help/import-customers

Merging duplicates

When two records are the same person, merge them into one.

Steps

1. Open one of the customers.
2. Press This is the same person as… and pick the other record.
3. Check what will be kept, and press Merge them.

Good to know

Every job, message and note moves to the record you keep.

Press Undo this merge if it was a mistake.

Notes on a customer

Add a note to a customer for your team: the gate code, the dog, the best time to call.

Steps

1. Open the customer.
2. Write the note and press Add the note.

Good to know

Notes are for your team. Customers never see them.

Or tell Orsa: "Add a note to Maria Lopez: side gate code 4471."

When a customer asks for their records, or to be deleted

A customer can ask for everything you hold about them, or ask to be erased.

Steps

1. Open the customer.
2. Press Download everything held about them to get their whole record to send them.
3. To erase them, press Erase this customer and confirm. This cannot be undone.

Good to know

The record that they asked not to be texted is kept even after erasing, so they are never texted again.

Only roles allowed to see or erase a customer’s whole record have these buttons.

https://orshihq.com/help/customer-records

What you can ask Orsa

Orsa answers questions about your work and about HQ, and can do almost anything you can do in HQ, once you press Confirm.

Steps

1. Press Ask Orsa on any screen.
2. Type or say what you want, such as "Who's off Friday?", "Move Maria's job to Thursday at 2" or "How do I add a technician?"
3. Read the answer. If it would change something, check it and press Confirm.

Good to know

When Orsa opens, it shows examples of what you can ask, only from what you are allowed to do.

Questions about how to do something in HQ get the steps from these help pages, with Take me there and Read more.

Orsa can book, move and cancel jobs, add and update customers, change prices and settings, draft and send Quotes and invoices, and look after your team. It can only do what you yourself are allowed to do.

What Orsa will never do

Orsa never saves anything on its own, never does money arithmetic, and never sees more than you can.

Steps

1. Every change waits for you to press Confirm.
2. Every figure comes from HQ’s price book or HQ’s own sums, never from the AI.
3. Orsa never makes an emergency less urgent, and never texts someone who did not contact you first.

Good to know

Everything Orsa does is recorded under the person who approved it. You are responsible for what you confirm.

Orsa only answers how-to questions from these help pages, so it cannot make up a button that does not exist.

Confirming and undoing what Orsa does

Orsa shows everything it would change before anything is saved, and a whole batch can be undone in one press.

Steps

1. Read the list of changes Orsa shows. Nothing is saved yet.
2. Press Confirm to make them all. A refund, voiding an invoice or erasing a customer is marked Asks you twice, and needs a second Confirm.
3. Changed your mind? Press Undo all of it to put the whole batch back.

Good to know

A change that cannot be put back says so before you confirm it.

Every change is recorded under your name, marked as done through Orsa.

Giving Orsa a spreadsheet or a photo

Attach a spreadsheet or a photo in Ask Orsa, and tell Orsa what to do with it.

Steps

1. Open Ask Orsa and press Attach a file. Pick an Excel or CSV file, or a photo.
2. Say what you want, such as "Update these prices" or "Add these customers."
3. Check what Orsa would change, and press Confirm.

Good to know

HQ reads the file itself. It is never sent to the AI, and only its name is kept afterwards.

A file can be up to 10 MB.

https://orshihq.com/help/orsa-files

Texting Orsa from your phone

Text your HQ number from your own phone to ask Orsa something or change something, without opening HQ.

Steps

1. Press your initials at the top right and open Your profile. Under Call me for callers, put in your phone number, tick Let me text Orsa from this phone, and press Save.
2. Text your HQ number from that phone, the way you would ask Orsa in HQ: "What's my next job?" or "Move the Lopez job to 3."
3. When Orsa would change something, it says what. Reply YES to do it, or NO to drop it. Reply UNDO to put back the last change.

Good to know

Orsa only answers texts from the number saved there, and only with what you are allowed to see and do.

A refund, voiding an invoice or erasing a customer asks you to reply YES twice.

Talking instead of typing

Press Speak once and say what you want. Orsa sends it when you stop talking and answers in writing.

Steps

1. Open Ask Orsa and press Speak once.
2. Say your question or what you want done. Your words appear as you speak, and it sends them when you stop.
3. Read the answer. Press Speak again for the next question. A change still waits for Confirm.

Good to know

Speech is turned into words by your phone or browser. The sound itself never reaches HQ.

To hear answers read aloud too, turn on Read Orsa's answers aloud in Your profile, under your initials.

What the AI sees, and your privacy

The AI is shown only what it needs for each job, and only what the person asking is allowed to see.

Steps

1. To read a question, the AI sees the sentence, not your records.
2. HQ's own code then reads your records through your own account, with your own permissions.
3. Orsa answers in your own language, from what HQ already holds.

Good to know

AI conversations with Orsa are kept for a year, then forgotten. You can forget one sooner from the panel.

Each company can switch AI features off in Features.

How Orshi charges you

Your plan, what you owe and your past invoices are in Configure, under This company.

Steps

1. Open Configure, then This company, and find Your plan.
2. See this month so far and your past invoices.
3. Press Add a card or Change card to pay from a different card.

Good to know

A job counts toward your bill once, when the customer picks their first time. Reschedules are free.

Each job’s own page says whether it is on your bill and why.

https://orshihq.com/help/orshi-bill

"We got it wrong" credits

If HQ made a mistake that cost you a job, take that job off your bill right away.

Steps

1. Open the job and find On your bill.
2. Press We got it wrong and pick what HQ did wrong.
3. It comes off your bill now. If it was Something else, a person at Orshi answers.

Good to know

Every job left off your bill has a reason recorded, so the bill always adds up.

Signing in and resetting a password

Sign in with your email and password, or with Google or Microsoft. If you forget your password, ask for a reset link.

Steps

1. On the sign-in page, press Forgot your password?
2. Enter your email. A link arrives by email.
3. Open the link and choose a new password.

Good to know

A manager can also send you a reset link from People and permissions.

To sign in with Google or Microsoft instead, press your initials at the top right, open Your profile, and press Connect beside the one you use. Your password keeps working.

Your profile and notifications

Everything about you, in one place under your initials: your name, photo, sign-in, language, look, start page and what reaches you.

Steps

1. Press your initials at the top right, then Your profile.
2. Change what you want and press Save. A new email is used once you open the link sent to it.
3. Under Notifications, tick where each kind reaches you when HQ is closed: this phone, a text or an email.

Good to know

The bell always has everything. Phone, text and email are each off until you turn them on.

Less movement keeps HQ still: nothing slides, and the bell does not swing.

https://orshihq.com/help/your-profile

Two-step sign-in

With two-step sign-in on, signing in also asks for a code from an app on your phone, so a stolen password is not enough.

Steps

1. Install an authenticator app on your phone, such as Google Authenticator, Microsoft Authenticator or 1Password.
2. Press your initials at the top right, open Your profile, and press Turn on two-step sign-in.
3. Scan the square with the app, or type in the key shown under it. Then type the six digits the app shows, and press Turn it on.
4. Keep your backup codes somewhere safe. Each one works once, for the day your phone is lost.

Good to know

On the live HQ, two-step sign-in is required for everybody.

Lost your phone? Sign in with a backup code, then press Make new backup codes. Or ask your company's owner to turn your two-step sign-in off, and set it up again on the new phone.

Your profile also lists your recent sign-ins, so you can see whether anybody else got in.

Languages: yours, your company’s and each customer’s

HQ speaks eight languages. Each person reads HQ in their own, and each customer is written to in theirs.

Steps

1. To read HQ in your own language, press your initials at the top right and choose it under Language.
2. To set the language your company writes in, open Configure, then Languages, and pick it beside This company writes in.
3. Each customer is written to in the language they write in. To correct one, pick another language beside their name on the same page.

Good to know

The eight languages are English, Spanish, French, German, Portuguese, Hungarian, Chinese and Tagalog.

The safety rules and the word to stop texts work in every one of them.

https://orshihq.com/help/languages

A text didn’t arrive

HQ never says a text was delivered until the carrier confirms it. Here is how to check.

Steps

1. Open the conversation and look at the message. It shows whether it was sent, delivered or failed.
2. Check Ready to go live. Until texting is approved, texts do not reach real phones.
3. Check whether the customer replied STOP, or whether your quiet hours are holding it.

Good to know

If a customer cannot get texts, call them from HQ instead.

https://orshihq.com/help/text-didnt-arrive

A page looks broken after an update

After HQ is updated, your browser may still be showing the old page. A fresh load usually fixes it.

Steps

1. Reload the page.
2. If it still looks wrong, open it in a private or incognito window.
3. Still wrong? Press Something's off on the page. It sends us exactly what you saw.

Good to know

Something's off gives you a reference to mention if you contact us.

Getting help from a person at Orshi

Support can come into your account to help, but only when you let them in.

Steps

1. Contact Orshi at contact@orshihq.com.
2. When support asks to come in, open Configure, then Somebody from support, and press Let them in or say no.
3. Or press Make a one-time code and read it to them on the phone.

Good to know

While support is in, every screen says so and everything they do is recorded. You can end the visit at any time.

https://orshihq.com/help/help-from-a-person

Asking customers for a review

After a job, HQ can text the customer a link to leave you a review.

Steps

1. Open Configure, then This company, and paste the link to your review page.
2. Open Configure, then Reviews, to check review requests are on and see what is stopping any.

Good to know

Without a review link, review requests are not sent at all. They follow your quiet hours.

https://orshihq.com/help/review-requests