Help and FAQ

The in-dashboard Help page: an AI chat for platform questions, a searchable FAQ organised by topic, and a fall-back path to the Report an Issue form when an answer is not there.

Up to date as of v1.32.0

CONTENTS

- What the Help page offers
- Browse by category
- Searching the FAQ
- The AI Help chat
- When to fall back to Report an Issue

What the Help page offers

Sidebar ’ Help opens /dashboard/help. The page is the canonical place to look something up about the platform. It carries three things side by side. An AI chat for conversational platform questions ('how do I cancel an open Let's Meet poll', 'what does the trial-expired email say'). A searchable FAQ broken into 28 topical categories covering every module — pick a category from the accordion and the questions inside expand. A featured download card for the Service Agreement Compliance research report (a free reference document covering why SA gaps are the most common immigration-practice compliance issue and how RCIC App's Service Agreements module helps close them). Together the three cover the 'I have a platform question' use case end-to-end.

Browse by category

The FAQ is organised into 28 categories at this writing, with new categories added as new modules ship. The current set covers Getting started, Stripe and payments, Admin fees, Google Calendar, Services, Availability and off-days, Bookings, Discount codes, Invoicing (Single Bills), Events, Written Consultations, Agreements (CICC-aligned and custom), Service Agreement Builder customization, Co-Counselling Agreements (between two RCICs), Transfer Room (file exchange with clients), Fax, Branding, Secure PDF Tools, Let's Coordinate (group

meeting scheduling), Let's Decide (structured surveys), the Embeddable widget, Language, Security and abuse prevention, Account and privacy, Troubleshooting, Intake Forms, Service Proposals, and Booking Notes. Each category is a collapsible accordion; click the category header to expand it and see every question inside, then click each question to read the answer.

Every question and every answer is fully translated into Quebec French. The page renders in your current dashboard language (set via the language picker in the top bar); switching languages flips every FAQ question and answer in place without losing your accordion state. The FAQ is mirrored from a static source file the platform team maintains — when the team ships a fix or a feature, the FAQ entry gets updated in the same release so the answer the chat refers to and the answer you read in the accordion stay in sync.

Searching the FAQ

Above the category accordion, a search box lets you filter every question and answer across every category at once. Type a keyword or short phrase ('Stripe Connect', 'reschedule a booking', 'two-factor authentication', 'fax cover sheet QR') and the page narrows to the matching items in real time — no submit button, no round-trip to the server. The search is case-insensitive substring matching against both the question text and the answer text in your current language. Categories with zero matches are hidden; categories with matches stay open with only the matched items visible. Clearing the search box restores the full accordion to its prior open / closed state.

A URL query parameter `?q=<text>` pre-fills the search box on page load. The pattern lets the platform team (or you) link directly to a specific search result from outside the dashboard — useful when answering a tenant question in a support channel and you want to send them straight to the relevant FAQ entry rather than describing it.

The AI Help chat

Alongside the FAQ, the Help page carries a conversational AI chat. Type a platform question in plain language and the chat replies with a grounded answer derived from the platform documentation. The chat is conversational — it remembers the current session's question-and-answer history so you can ask follow-ups without re-stating context ('how do I add a co-counsel to a Transfer Room' followed by 'and what about removing them later' works as a natural sequence). The chat is uncapped per tenant: every team member can use it as much as they want, every day, regardless of subscription tier. Even tenants whose Premium trial has expired keep unlimited access — the chat is the one AI surface the platform considers part of the basic service rather than part of the paid quota.

The chat is grounded — it is not a general-purpose AI you can use for unrelated work. The system prompt is locked to the platform's documentation and the chat will politely decline (or admit ignorance) on off-topic questions. Asking 'how do I file a Spousal Sponsorship application' will get redirected to use the AI Writing Assistant or talk to a regulated consultant; asking 'how do I configure the Service Agreement template library' will get an actual answer. The trade-off is that the chat is reliable as a platform reference but cannot help you write a client letter or do legal research on an immigration question. For those needs, the AI Writing Assistant (Premium-only, draft-pad at /dashboard/ai-assistant) is the right tool.

When to fall back to Report an Issue

The Help page answers most platform questions, but it is not the right channel for everything. When the FAQ and the chat both fail to surface an answer — typically because the question is about a bug, an unexpected platform behaviour, or a feature gap rather than a documented workflow — the right next step is the Report an Issue form (Sidebar ’ Report an issue). The form lets you attach screenshots and PDFs to your report, which is exactly the context the platform team needs to either reproduce the bug or understand the feature gap. See the Reporting issues chapter for the full walkthrough of what to include and what happens after you submit.

For security-shaped concerns specifically (a potential cross-tenant data leak, an unauthorised access path, an exposure of client information), neither the chat, the FAQ, nor the in-app form is the right channel. Use the

dedicated info@investatech.com email with 'Security Report' in the subject line; the platform team treats security reports as priority and aims to acknowledge within one business day. The Security and privacy chapter covers the full security-disclosure pattern.