

CHIE Portal User Manual

Compact founder guide for login, credits, KYB, discovery, review milestones, and final report access.

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1. Platform Purpose

What CHIE does — CHIE is RBC's venture diagnostic platform for identifying strategic, operational, market, financial, and leadership gaps before they become scale blockers.

- Combines structured founder inputs, deterministic validation, AI-assisted refinement, and SME review.
- Produces a boardroom-ready assessment with clear evidence, operating context, and action priority.
- Designed to improve founder quality of input before the final report is prepared.

2. Login and Access

Passwordless entry — CHIE uses OTP-based sign-in for secure founder access.

- Enter your registered email address and request the login OTP.
- Use the 6-digit OTP sent to your inbox to sign in.
- Active-session safeguards and inactivity timeouts help protect founder data.

3. Profile and Identity

Set up founder and entity details — Complete your profile before starting a submission.

- Provide founder name, location, organization, and phone number.
- Add at least one valid business identifier such as CIN, LLPIN, or business PAN.
- Use official and current identifiers and review fetched entity details before proceeding.

4. Credits and Orders

Choose the right tier — Submissions are credit-backed and tier-specific.

- Open the payment or orders area and select the required tier and quantity.
- Complete checkout and confirm the credit appears in your wallet.
- Use one credit per new submission and review orders for payment reference.

5. KYB Submission

Build the business baseline — KYB creates the structured startup profile that drives discovery and report quality.

- Cover startup details, leadership, market, traction, revenue model, and attachments.
- Keep legal details exact and keep founder data aligned with company records.
- Use supporting documents and evidence-backed numbers wherever possible.

6. Save, Review, Submit

Submission discipline — CHIE preserves founder progress through save-state protection and validation checkpoints.

- Draft progress is saved while you work and save-state notices should appear only when changes are pending.
- Completion percentage should reflect actual filled and saved progress.
- Submit only after required fields, declarations, and attachments are complete and valid.

7. Discovery Workflow

Founder response quality matters — Discovery is generated from your KYB context, operating reality, and final-report objective.

- Answer the exact question asked with units, dates, percentages, counts, owners, and timeframes.
- Use REFINE WITH CHIE only to improve articulation, not to invent facts.
- Add evidence where relevant and save before leaving if a save-state warning is shown.

8. Report Delivery

Founder access after review — After discovery review and approval, CHIE prepares and releases the final report.

- Founders can access the interactive report and downloadable PDF from the dashboard.
- Report output is intended for management, investor, and board-level discussion.
- Supporting artefacts or appendices may be available alongside the final report.

9. Support and Notifications

Operational follow-through — Use the portal notification center and support page for updates and issue resolution.

- Notifications can cover login, payment, lifecycle changes, review milestones, and support responses.
- Choose the right support category, explain the issue clearly, and attach references where useful.
- Keep answers factual, review fetched data carefully, and avoid placeholder text in important fields.