



Orchestrator AI

QUICK INSTALL GUIDE

for MacOS

Orchestrator AI

THE AI PLATFORM BUILT FOR UK FINANCIAL ADVISERS

<https://orchestratorlab.ai/>

Orchestrator AI Quick Install Guide for MacOS

Prerequisites

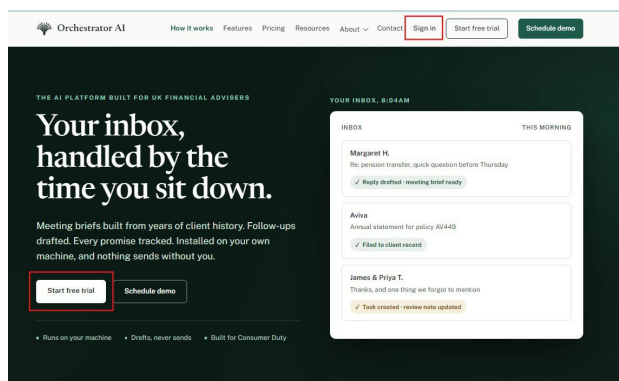
- A Mac computer (Apple Silicon or Intel).
- An authenticator app on your phone (Microsoft or Google Authenticator), set up with the code from your welcome email.
- A Google Workspace or Gmail account you use for client email.

Activate and Install Orchestrator AI

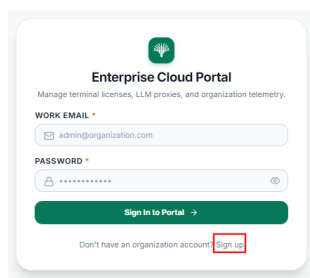
Follow the instructions below to create your account and install the Orchestrator AI app.

A. Create Your User Account

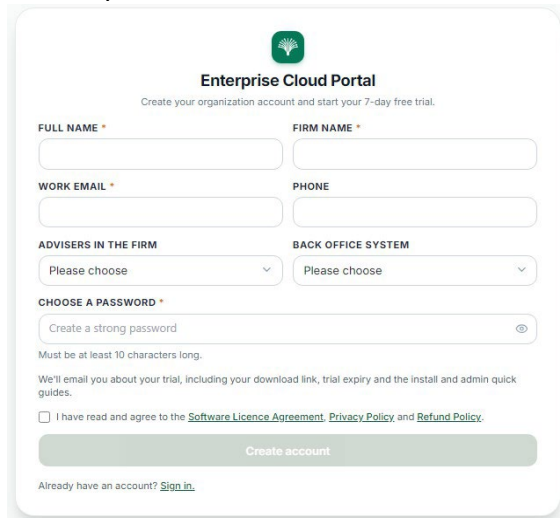
1. Go to <https://orchestratorlab.ai/> and do one of the following:



- click the **Start Free Trial** button or
- click the **Sign in** button instead on the top menu bar and then click the **Sign up** button on the login page.

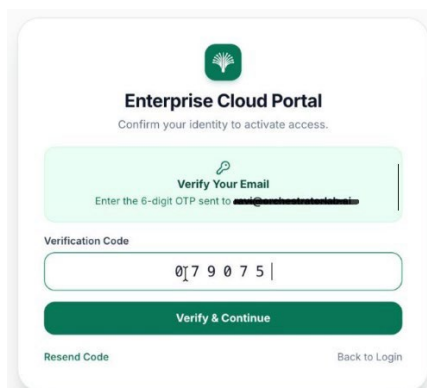


2. Fill in the required details such as your name, firm name, work email, phone number, and a password.



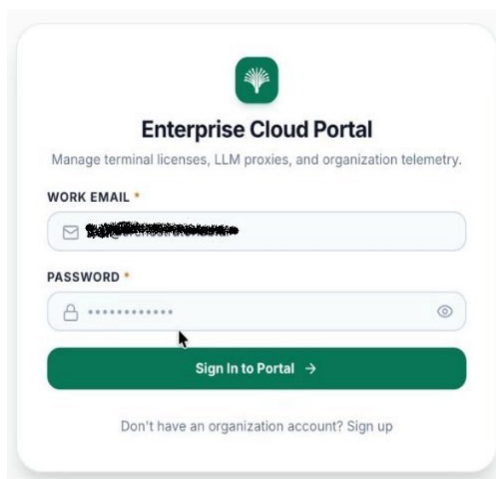
The registration form for the Enterprise Cloud Portal. It includes fields for Full Name, Firm Name, Work Email, and Phone. There are dropdown menus for 'Advisers in the Firm' and 'Back Office System'. A password field is present with a strength indicator and a note that it must be at least 10 characters long. Below the password field is a checkbox for agreeing to the terms and policies. A 'Create account' button is at the bottom, and a link to 'Sign in' is provided for existing users.

3. Tick the agreement box and click **Create account**. A **Verify Your Email** window pops up, and a verification number is sent to your email.
4. Check your email inbox for a 6-digit code. Enter the 6-digit code in the **Verify Your Email** window and click **Verify & Continue**.



The 'Verify Your Email' screen. It prompts the user to enter a 6-digit OTP sent to their email. A text box shows the code '0179075'. Below the text box is a 'Verify & Continue' button. At the bottom, there are links for 'Resend Code' and 'Back to Login'.

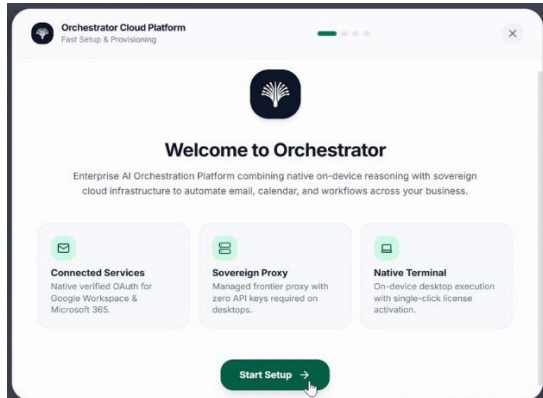
5. Sign-in with your registered email address and password. Continue to section B below.



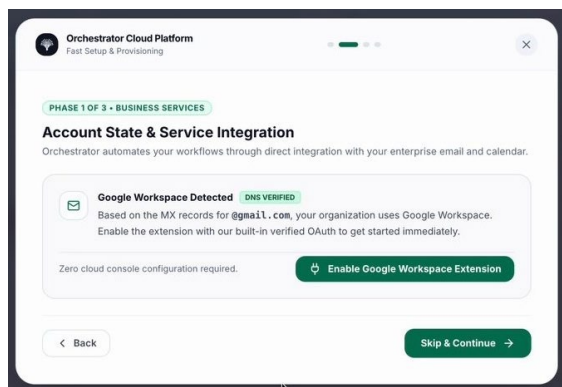
The sign-in screen for the Enterprise Cloud Portal. It features fields for 'WORK EMAIL' and 'PASSWORD'. A 'Sign In to Portal' button with a right arrow is prominently displayed. Below the button, there is a link for users who do not have an organization account to 'Sign up'.

B. Setup & Install Orchestrator AI

1. Once you sign-in with your email address and password, the welcome screen is displayed. Click **Start Setup**.

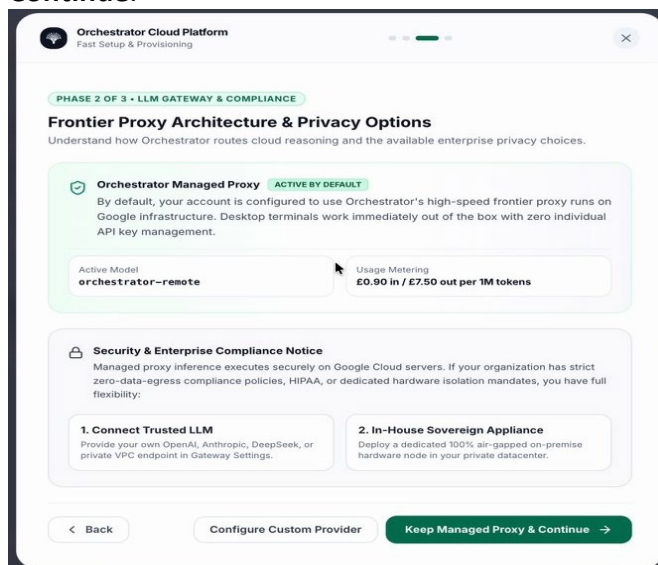


2. The app auto detects your email provider. Click **Enable Google Workspace Extension**.

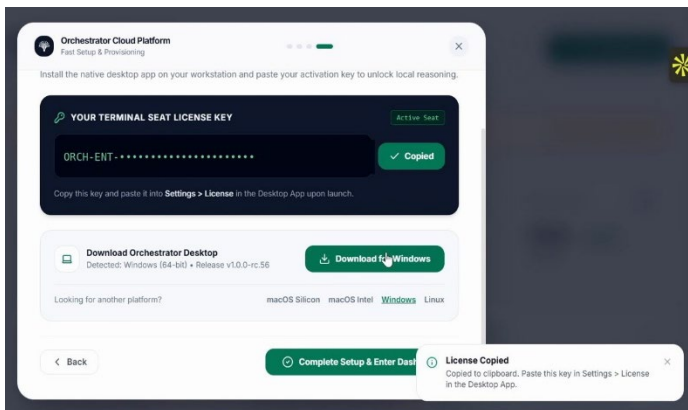


3. Then click **Continue to Proxy Settings**.

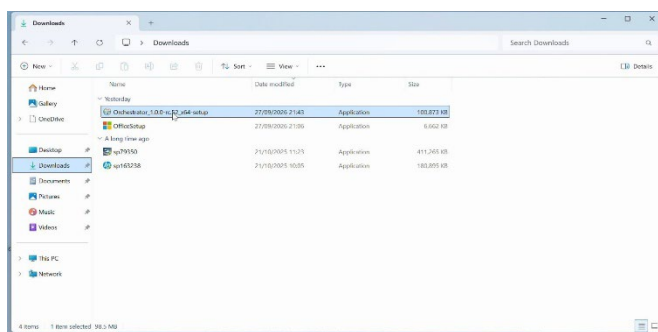
4. The managed proxy is turned on by default. No setup is needed. Click **Keep Managed Proxy & Continue**.



5. The license key is now displayed. Click **Copy Key** to copy the key (paste it in a Word doc for reference).



6. Click **Download for Windows**. A file will start to download in the background.
7. Click the **Complete Setup & Enter Dashboard** button.
8. On your computer, open the Downloads folder.
9. Double-click the Orchestrator setup file.



10. Click **Next** in the **Orchestrator Setup** wizard.

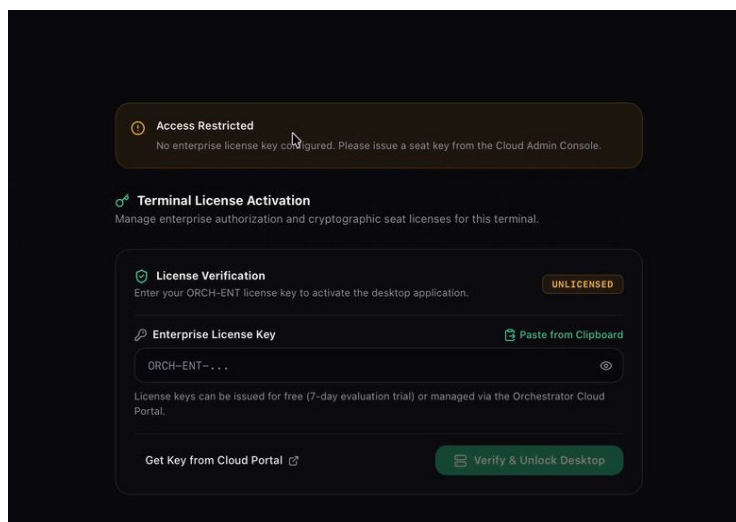


11. Follow the on-screen instructions.
12. Once the app is installed, in the **Completing Orchestrator Setup** window, check **Run Orchestrator**, and click **Finish**.

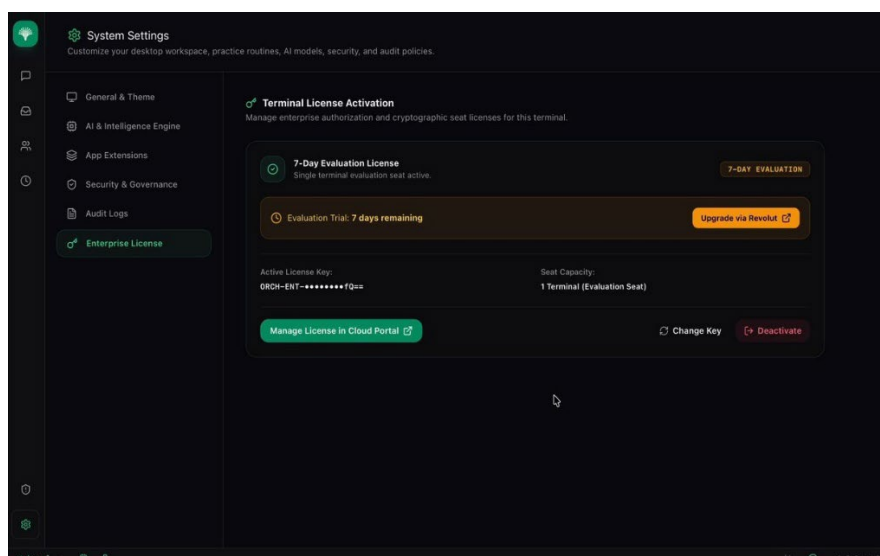


C. Activate Orchestrator AI

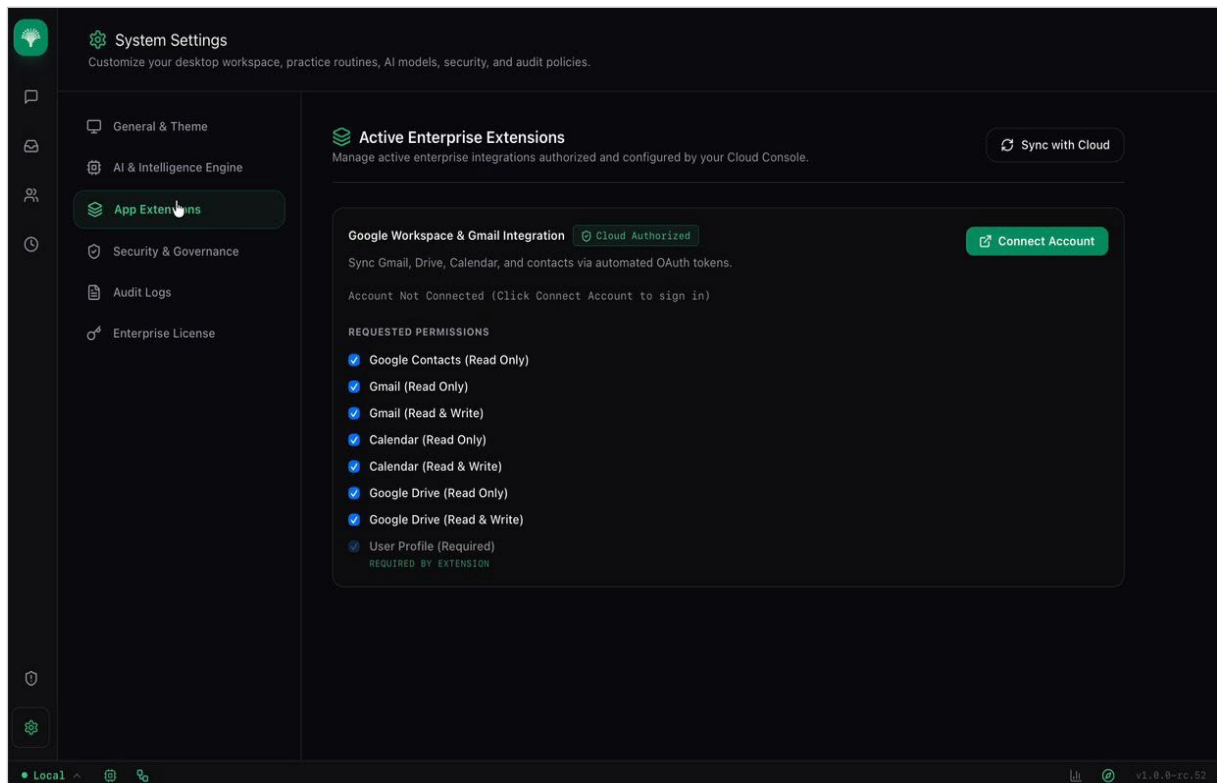
1. From your desktop, open your Orchestrator app.
2. In the License Activation window, paste the activation key copied earlier in step 5 above.



3. Click **Verify & Unlock Desktop**. The app confirms your evaluation license is active.

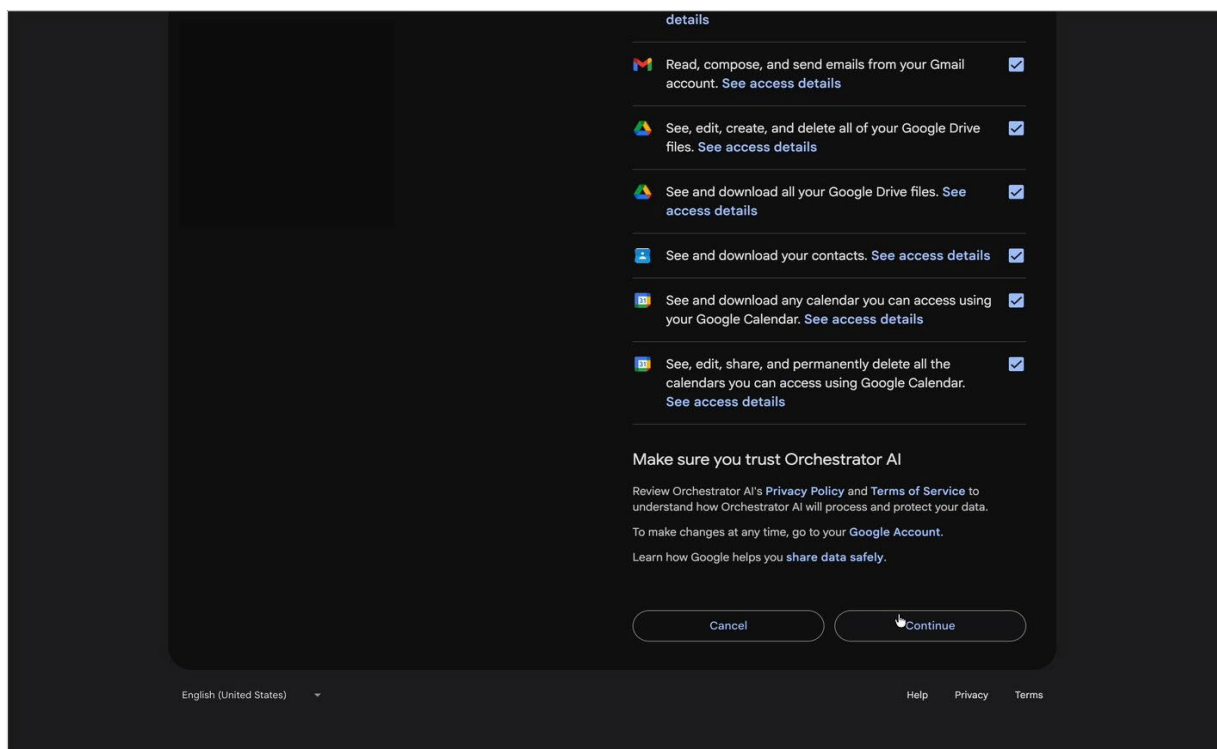


4. In the **System Settings** window, click **App Extensions** on the left menu bar.

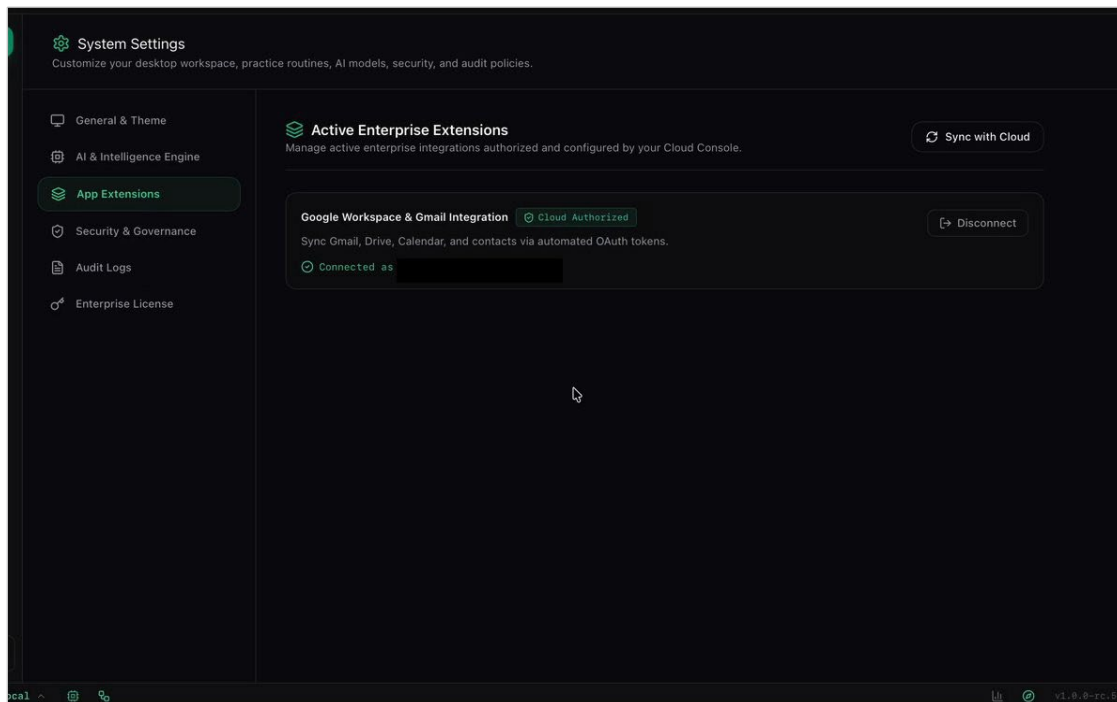


5. Then click the **Connect Account** button on the right and sign in with your Google Workspace account.

6. Select all and click **Continue**.



7. Once your email shows as connected, **Orchestrator** is now ready to use.



*If you encounter any issues throughout this process,
please contact us at support@orchestratorlab.ai*