

# August 2020 Software Update: Full Release Notes



In a busy summer full of mergers, new portals, and reimagined homescreens, the team here at Orion still found the time to build a number of new updates into the many tools available as part of our technology suite. As a reminder, these release notes are now mapped to the four pillars of the advisor-client relationship that drive the Orion Vision: Prospect, Plan, Invest, Achieve.

Across each of these pillars, we are dedicated to building solutions that enable your firm to build a long-lasting, future-ready business. And to that end, we are excited to bring you all the latest updates below. You can also see these updates demoed during our upcoming product update webinar on Thursday, August 27th at 11:00 CT. During that webinar our Product team will walk through each update in detail and answer any questions you may have via the live chat box.

## Prospect

### Market\*r

#### New Campaign Topics

Each month, new content on engaging, up-to-the-minute topics will be added to the Market\*r platform. This month, we've added two new topics: Client Engagement and Retirement Seminar.

- **Client Engagement:** Boost engagement and easily show your clients they're a top priority with automated campaigns on some of the most popular—and important—client communication topics.

- Retirement Seminar: Featuring customizable PowerPoint presentations, pre and post-event communications, and other useful assets, these campaigns will make hosting your next virtual or in-person workshop a sinch.

*How to get there: Orion Connect > Orion Market\*r*

## **Glia Chat Support**

To help your team connect quickly to our team of Market\*r platform experts, we have enabled Glia chat support in the platform. Simply click the, "Let's Talk!" button to be connected to a Market\*r Subject Matter Expert.

*How to get there: Orion Connect > Orion Market\*r > Let's Talk button*

# **Plan**

## **Orion Planning**

### **Filing State & Filing Status Moved to Personal Information Page**

Where previously you needed to indicate your client's Filing State and Filing Status in the Taxes tab, you can now do this in the Personal Information tab. This will help with not only your user experience but also with your ability to make future updates and utilize this information for other inputs that happen before the Taxes tab.

*How to get there: Orion Connect > Advizr > Profile > Personal Information*

### **Trusts Moved to Personal Information Page**

In the past we had a dedicated Trusts tab but we've moved this input to the Personal Information Page. This change will make the process of adding accounts owned by trusts more efficient as this allows you to add your client's Trusts and their beneficiaries before the Accounts and Other Assets page.

*How to get there: Orion Connect > Advizr > Profile > Personal Information*

## **Business Sale Enhancements**

We have improved our business sale functionality so that now you can not only show proceeds from the sale beyond one year and into multiple years beyond the sale, but also show how their net worth will be impacted over time.

*How to get there: Orion Connect > Advizr > Profile > Other Assets*

## **Tracking Activity When a Client Views a Document**

When you or your client upload a document to our Document Vault, it is tracked within our User Activity Page. Now, we'll also be tracking when a client opens a document within this User Activity Page. This is in addition to you receiving an email and notification in our notifications bell when a client uploads a document to the Document Vault. Our goal is to help advisors and firms track these communications and client engagement.

*How to get there: Orion Connect > Advizr > Click on Client's Name Near Top Left > User Activity*

## **Client Portal**

### **The One Portal Project**

As of today, Orion offers two separately powerful client portals advisors can offer via Orion that both provide unique solutions. Our One Portal Project is bringing our two portals together into one, helping advisors provide a comprehensive client experience that is consistent across platforms, without the need for multiple logins. This newly consolidated portal will provide your investors with a true personal financial management experience by giving them access to all the tools they need to oversee their financial lives including performance reports, account aggregation, account opening, financial planning information, and more—all from a single portal.

In case you missed it, we aired a webinar detailing the latest updates. You can watch that webinar here: [Orion Client Portal Webinar](#). If you would like to be among the first to transition from the legacy client portal to the new client portal, sign up at: [orionadvisortech.com/clientportal/](https://orionadvisortech.com/clientportal/)

### **Client Portal Redirect**

To help your firm transition clients from the legacy client portal to the new client

portal, we've built a toggle that will redirect your clients to the new portal. Your clients will still use the same login page and credentials they are using for the legacy client portal so the transition will be seamless for them and this means you will not need to invite each of your clients one by one to the new portal.

If you would like to switch to the new client portal, please contact our Platform Support Team or sign up to learn more about the new portal at [orionadvisor.tech.com/clientportal/](http://orionadvisor.tech.com/clientportal/).

## **Portfolio Groups Are Now Used in the Client Portal**

In the past your clients had the ability to view their accounts either at the account level or Managed vs Unmanaged at an aggregate level. Now we utilize the Portfolio Groups to help them view their accounts in a more organized and meaningful way.

*How to get there: Orion Connect > Advizr > Personal Finances*

## **Ability to Choose Client Landing Page**

You now have the ability to choose the first page your client sees when they log in to the client portal. The default landing page is the Consumer Overview page, but you can choose to send them directly to Personal Finances, Goal Results, Document Vault, Profile, Reports, or even Credit Monitoring if you are utilizing that service with your client. This setting can be not just a client setting, but also something you can set at the firm or advisor level.

*How to get there: Orion Connect > Advizr > Click on Client's Name Near Top Left > Invite to Advizr / Configure Access*

## **MoneyGuide Integration**

For those of you who use MoneyGuide for your financial planning tool, we now have the same integration for our new client portal that you have been using for the legacy client portal. This includes your clients being able to see the Summary, Insurance, Goals and Net Worth Pages as well as giving them the ability to access their plan within MoneyGuide from our client portal.

*How to get there: Orion Connect > Advizr > MoneyGuide Financial Planning Tab*

## **Riskalyze Integration**

For those of you who use Riskalyze, we've improved our integration to not only be able to pull in your Riskalyze Models to use as part of your recommendations for your clients goals, but we can now also pull in the client's Risk Score, the score of how their accounts are currently allocated and finally your Portfolio Recommendation Score as well.

*How to get there: Orion Connect > Advizr > Personal Finances > Risk Profile*

# **Invest**

## **Eclipse**

### **New "Expand" Option in the Tactical Tools Grid**

Quickly pop out of windows and edit details more easily with the new option to expand the tactical tools grid. Expanded grids will still update real time when items are added/removed and can be collapsed as needed.

*How to get there: Orion Connect > Eclipse > Trade Tools > Tactical Trade Tool*

### **Improved Team Model Imports**

To help your team import models more easily, we made two updates that improve this process:

- **Import Team Assignments on Security Sets:** You can now update assignments across your team with the new ability to import team assignments. Exporting the security set will only show the team ID's that the user has access to and will only affect the teams the user has access to. If a user only has access to "view" the security set, then importing will not be possible.
- **Team ID Column Added to Model Import:** We have added the Team ID column to the model import. Importing models with the Team ID will assign the teams on the file, and unassign all that are not on the file.

*How to get there: Orion Connect > Eclipse > Models > Model Import*

### **Remove Disabled Restricted Plan Trades**

Currently any time a rebalance or other trade tool is ran, buys in restricted plan accounts are set to zero value. Now, you can ignore zero quantity “restricted plan” trades on the orders grid and avoid needing to delete them manually.

*How to get there: Orion Connect > Eclipse*

### **Allow Negative Cash in Tactical Rebalancer**

Now, you have the ability to determine how much cash to protect in the tactical rebalance, allowing the account to go negative or keep all existing cash, depending on the best scenario for your trade. If you do not use the “rebalance cash” option, then the system will attempt to raise cash back up to target at the end of the rebalance.

*How to get there: Orion Connect > Eclipse > Models > View a model > Tactical Rebalance*

### **Group Portfolios by Team in Zip Folder**

You can now group portfolios by the Primary Team Name in the folder export for the trade analysis report, enabling you to easily sort and navigate the reports exported. When multiple trade analysis reports are exported, you can add sub folders using the Primary Team name assigned to the portfolios.

*How to get there: Orion Connect > Eclipse > Trades > Orders > Three dot > Report > Trade Analysis*

### **Accrued Interest Value Added to Eclipse**

With this release, we have implemented a way for you to trade based on accrued interest in Eclipse. To do so, the Eclipse Extract will now find the value of accrued interest and add shares into the position to increase its value in Eclipse to include accrued interest.

To enable this feature, contact: [trading@orion.com](mailto:trading@orion.com).

*How to get there: Orion Connect > Eclipse > Start new import*

# Communities

## Retrieve Billing Reports from Communities

Now, strategists can retrieve billing recon reports from the application enabling them to efficiently access reports and ensure their payout matches those reports.

*How to Get There:* Orion Connect > Communities > Menu > Billing

## New Communities Strategist: Fidelity Institutional

Fidelity Institutional has made its core lineup of strategies available through Communities. Eight new investment strategies and a themed, separately managed account (SMA) join Orion's Global lineup, comprising:

- Fidelity Sector Equity Business Cycle (I) Model Portfolio
- Fidelity Multi-Asset Business Cycle (I) Model Portfolio
- Fidelity Bond Income (I) Model Portfolio
- Fidelity Target Allocation 20/80 (I) Model Portfolio
- Fidelity Target Allocation 40/60 (I) Model Portfolio
- Fidelity Target Allocation 60/40 (I) Model Portfolio
- Fidelity Target Allocation 70/30 (I) Model Portfolio
- Fidelity Target Allocation 85/15 (I) Model Portfolio
- Fidelity Advisor Women's Leadership SMA
- Single Ticker - Fidelity Select Gold Portfolio (FSAGX)

# Achieve

## New Orion Connect Home Page Dashboard

As you probably know, we have reimagined the Orion Connect Home Page so that it surfaces the details that matter most to you—decided by you—so you can prioritize your day-to-day appropriately. We are excited to announce that the new Homepage will be available to all Orion firms on August 31st. To learn more about the redesign, check our landing page.

To get started, simply enable the new homepage or, for more guided help, reach

out to our Platform Support team using “Contact Us’ on your current home page or call 888-279-8447.

## **Billing and Composites**

### **Create an “@” Tag for Related Households**

To help identify the Related Households that are being aggregated together for Billing purposes, you can now tag those households with the “@” function.

*How to get there: Orion Connect > Reporting*

### **Change Logic of Recurring Start Date**

Currently, when you add a recurring adjustment with a start date during the billing period, it will not apply until the next billing cycle. To improve this, we now allow for a recurring adjustment to be prorated if the start date is during the billing cycle.

How to get there: Orion Connect > Reporting

## **Recon and Dashboards**

### **Turn Held-Away Assets Into Billable Assets with FeeX**

Access Feex, the innovative technology that enables advisors to manage and trade held away accounts just like they do with custodied accounts. This enables your firm to turn held-away assets such as 401(k) holdings into billable assets while also working to help improve client returns.

*How to learn more: Refer to the “FeeX: Interface Setup” and “FeeX: Vendor Summary” articles in the Support App.*

## **Integrations**

### **Enhanced eMoney Data Export**

We have added an option to allow new, unfunded accounts to be included in the export to the eMoney system that helps aid in the linking of new accounts into eMoney financial plans.



# Reporting

## Allocation as a Data Source

This month, we've added the ability to use allocation as a data source in report builder by simply clicking the bar chart and typing in "allocation" in the data source field of the editor. This update enables your firm to create more accurate visuals for allocation-focused bar charts while also providing more aesthetic diversity to the reports you build.

*How to get there: Orion Connect > Reports App > Custom Reports > Edit > Left click on an existing bar chart or add a new one > Under configuration enter in Allocation and select "Allocation Level 1"*

# Compliance

## Add Custom Licenses to a Profile

To help create more accurate profiles of your team, you now have the ability to add custom licenses to a profile in the Inform Tool, in addition to the existing FINRA licenses already available.

*How to Get There: Compliance > Inform > Manage Options*

2160-OAS-08/20/2020

Fidelity Institutional makes Fidelity Model Portfolios available through Fidelity Distributors Company LLC; and clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.

Fidelity Investments® is an independent company, unaffiliated with Orion Advisor Solutions. Fidelity Investments is a registered service mark of FMR LLC.

The Fidelity Advisor SMAs ("SMA Models") are made available to financial intermediaries on a non-discretionary basis by Fidelity Distributors Company LLC (FDC LLC), a registered broker-dealer, as a paid solicitor of its affiliate and provider of the SMA Models to financial intermediaries, FIAM LLC, a registered

investment adviser. Financial intermediaries that utilize the SMA Models compensate FIAM LLC for such advice. FDC LLC and FIAM LLC are referred to collectively as “FIAM” or “Fidelity.”