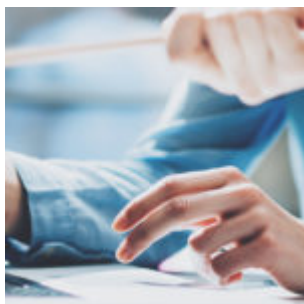


Easy Button: New Platform Support Resources Available at a Click



At Orion, we are equally committed to innovation and to your success as a financial advisor. We know how frustrating it can be to implement a piece of software and not have the support you need to get the most out of it.

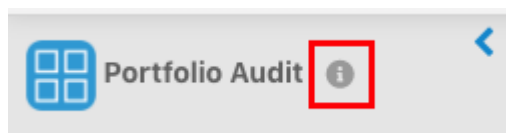
In an effort to help you leverage all of the robust tools we have to offer, we host unique training opportunities throughout the year, such as our Launch events, Tech Labs, and Ascent user conference, as well as continually add new daily-use resources to our comprehensive technology platform.

For this week's Tech Tip, we look at two new resources to make your lives and your Orion experience better, available now within Orion Connect.

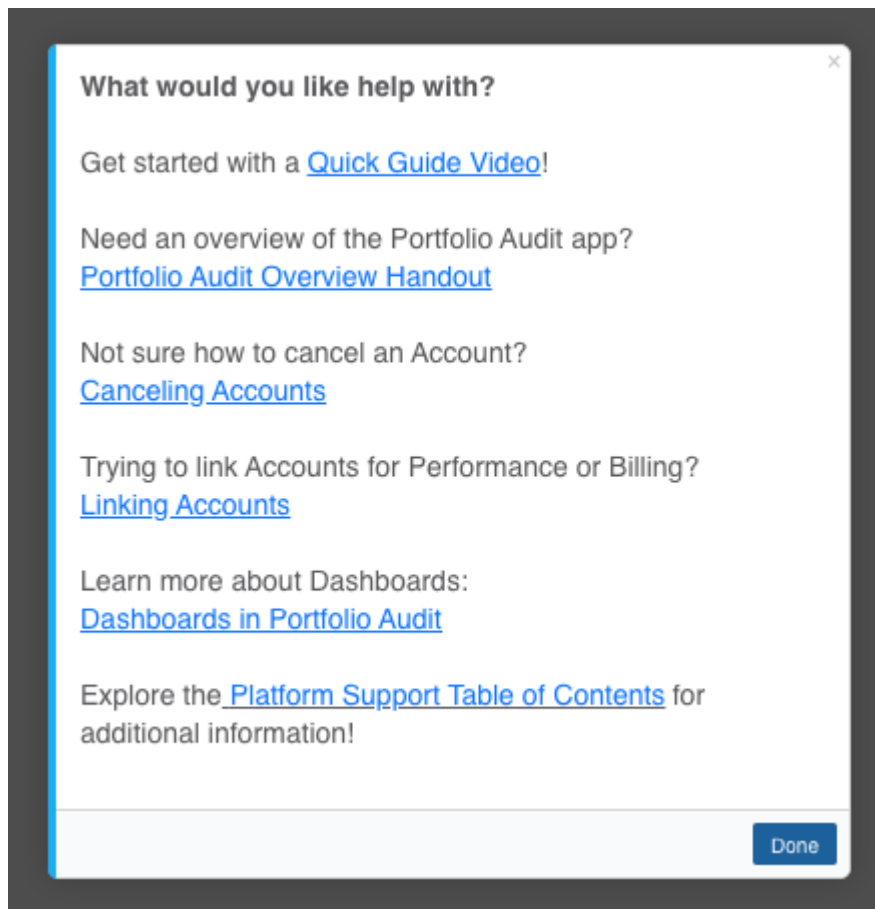
What's New

The Portfolio Audit and Manage Users apps are crucial in the process of adding new users, setting up roles, and managing permissions. In order to make it easier for you to complete those important processes, we have added Resource buttons to allow you to access help documents and webinars without leaving the app.

To access these resources, simply click on the "i" button in the upper left-hand corner next to the app name:



A pop-up box will appear with a list of all of the resources available:



Within the Portfolio Audit app, we also have added to the list of resources a Flash Training video that gives a 90-second overview of the app and a link to the newly added “Platform Support Table of Contents” help document.

More Resources

In addition to these two new apps, there are Resource buttons available in the Bill Generator, Billing Audit, Reporting, Products and Prices, and Performance Viewer apps; all to help you get the most out of your Orion technology.

Need more help with Orion Connect? Contact our Platform Support Team through the in-platform chat or by emailing platformsupport@orion.com.

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