

Brand New Reasons to Love Report Builder



Reporting will always be an integral part of your job as a financial advisor. And at Orion, it's our job to make your job easier.

To that end, we've not only created a custom reporting tool, Report Builder, but we've also promised to keep it continuously updated with innovative improvements that streamline your operations and enhance your clients' experiences.

We keep our promises.

In May, we released a host of updates to our report building tool. Below are some of the highlights, as well as the reasons we think you'll love them.

What's New?

A deeper integration with our Compliance tool means that your reports will now be included in the Compliance Archive.

Why?

As the SEC asks for increasing evidence of *how* you're proving compliance, having these reports at the ready will make it easier for your firm to stay on top of regulatory requirements.

What's New?

You now have the ability to group by time on tables without needing to create additional rows every time.

Why?

Time intervals allow you to show portfolio data by month, quarter, year, and other intervals, all the way back to its inception. This makes it quick and easy to customize the range of data you want to see in a report, and gives your clients a meaningful view of their account history.

What's New?

You can now filter data on tables and charts; single or multiple filters can be added to narrow the scope of data returned on a report.

Why?

By presenting your clients with exactly what they need to know — and not overwhelming them with unnecessary information — you make it easier for them to understand what's happening with their portfolios.

What's New?

You can select alternate line shading on specific elements. When using a Static or Grouping table, the line shading can be enabled or disabled within the setting tab.

Why?

Being able to easily create a stylistic report that makes sense visually not only saves you time, but it also helps your clients to follow and understand your presentation. Additionally, using this setting allows you to operate independently of any theming constraints.

What's New?

We've added new @tags to help you report on even more data points for your clients:

- "Notes" @tag: Tags for Household Notes, Account Notes, and Trade Instructions can be used on reports and cover pages
- "Yield on Cost" @tag: Shows the annual dividend rate of security, divided by its average cost basis
- "Growth of" @tag: Displays performance for both the benchmark and the entity selected for growths of \$1, \$100, or \$1,000

- “Expense Ratio” @tag: Can be used on both products and asset levels, as well as at higher levels like account, household, and model.

Why?

@tags gives you the ability to pull in specific client data from across Orion’s entire platform in a simple, streamlined way, saving you time and helping to guarantee reporting accuracy.

We’ve made Report Builder better, but we’re not finished yet. Look out for new enhancements coming in August!

Want to learn more? If you’re not working with Orion yet, we’d love to start a conversation about how we can help make your day-to-day operations easier. Contact us today.

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