Coming Soon: Our Enhanced Bill Pay Feature



Here at Orion, we're dedicated to making sure our solutions are best for meeting a wide range of your firm's needs and we continually update and innovate our technology to support this goal.

To that end, we're just a few weeks away from the next Orion Software Update.In today's post, we're giving you your first look at one of the new and exciting enhancements you'll see this May—enhanced Bill Pay features for the advice-based services you offer!

Check it out:

Enhanced Bill Pay Feature For Financial Planning and More

We've heard from you that as your firm continues to offer value-add services for additional fees beyond traditional AUM, like planning, you need a frictionless solution to efficiently and effectively bill your clients for the full scope of capabilities you provide.

Our enhanced Bill Pay Feature will address this challenge!

As part of our May release, you will be able to create and maintain various fee types for financial planning, tax planning, accounting, and more, whether it is a one-time event or an ongoing fee. By supporting these various fee types, you can maintain all of your billing in Orion and offer clients a consistent billing experience.

Did You Know? Orion integrates with BluePay's payment processing platform. Our Bill Pay enhancement will allow these two tools to work even better together and help your firm get paid faster. Learn more about BluePay here.

We're excited to release our Bill Pay and other platform updates for you in May! Keep an eye out for more details and specific release dates. We look forward to helping you enhancing your day to day billing efforts!

Not an Orion client? Click here to talk with us about how Bill Pay can be used to help improve your firm's client service.

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