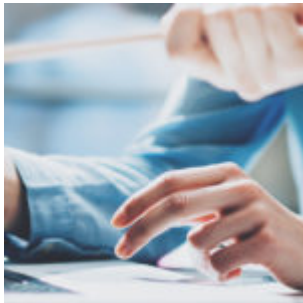


Creating Custom Fields Helps Advisory Firms Meet Unique Needs



No two advisory firms are alike. That's why we've built plenty of ways for you to customize Orion technology to better fit your business—and not the other way around.

And we're continuing to innovate new customization options to help your business succeed; like our reimagined Orion Connect user interface, which will allow you to personalize your Orion home experience and better prioritize your day.

For this week's Tech Tip, we will walk you through exactly how to create your own custom fields in Orion Connect.

Creating Custom Fields in Orion Connect Helps Advisory Firms Meet Unique Needs. [Click To Tweet](#)

What are Custom Fields?

Custom fields are available within the Portfolio Audit, Reporting, and Query apps within Orion Connect to help organize and keep track of unique identifiers.

These identifiers can be set up at the Representative, Household, Registration, Account or Product level.

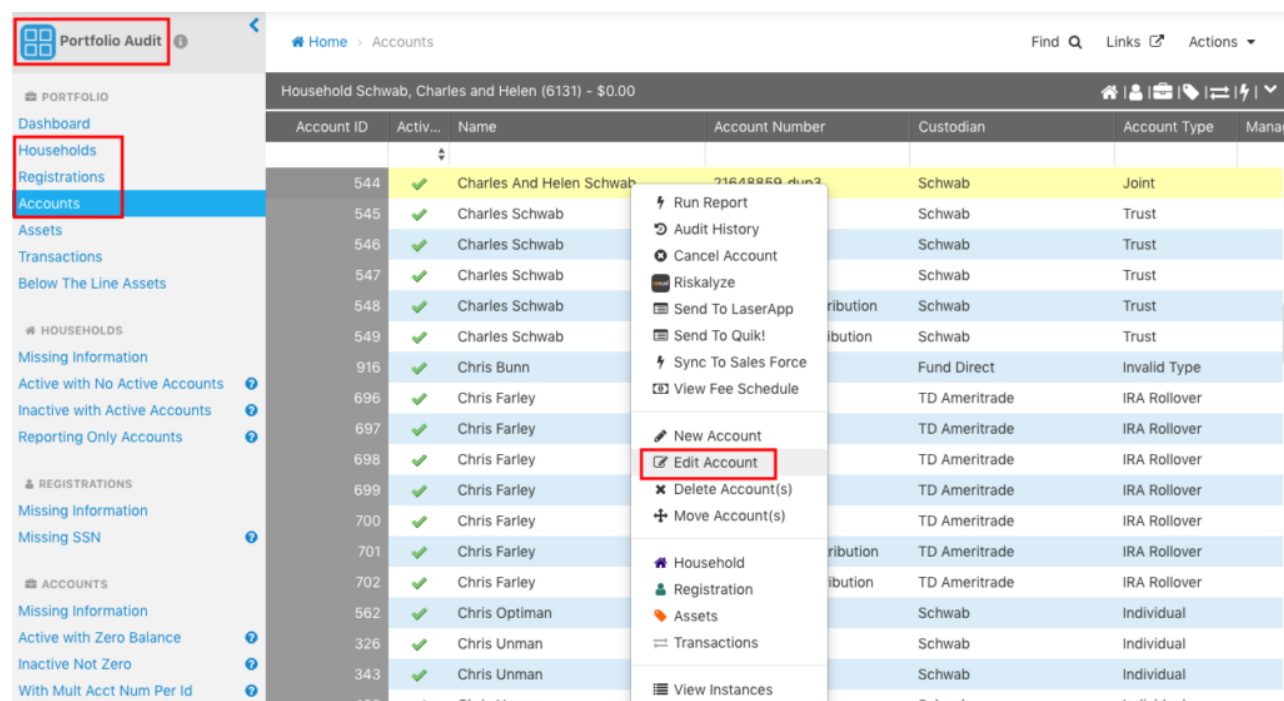
Some common examples of when you would want to create a custom field include:

- **The margin of an account**
- **Tracking another third grouping for products:** Orion already has Asset Class and Asset Category, but some advisors want to track a third grouping.

- **Document tracking:** Some advisors want to track when they send or receive specific documents from a client.

View Existing Custom Fields

Before you create a custom field, it is best practice to review already existing custom fields to ensure there is no redundancy.



To view existing custom fields, go to the Portfolio Audit App and follow these steps:

1. Choose the “Household,” “Registration,” or “Account” level
2. Find the item from the list.
3. Right-click to edit.
4. Choose “Custom Fields” on the left-hand side.

Charles And Helen Schwab, Joint (544)

\$0.00

Account Value

SAVE

CANCEL

None

Account

General

Change History

Model Assignment

Notes & Documents

Systematics

SLOAs

Target Allocation

Separately Managed

Astro Restrictions

Tax Schedule

Billing

General

General Account

Payees

Recurring Adjustments

Projections

Goals

Growth Rates

Settings

Custom Fields

Options

Integrations

Quik!

Custom Fields

Account

Registration

Household

Representative

Broker/Dealer

Sort Order

test

t

calen

08/30/2017

TAS Last Reconciled Effective Date

Onboarding Test

Test - Custom Field Audit

Historical Data Ready

Actions

Add New

How to Create a Custom Field

The navigation steps for creating a custom field are the same as listed above for viewing existing fields.

After you are in the “Custom Fields” section of the household, registration or account, you will then click “Add New” in the top right-hand corner. This will then open a pop-up box.

Charles And Helen Schwab, Joint (544) ▼

None

\$0.00

Account Value

SAVE CANCEL

Account

General

Change History

Model Assignment

Notes & Documents

Systematics

SLOAs

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Options

Integrations

Quik!

Custom Fields

Account

New Field

Name

Type

Sequence

Code

Default Value

Include on

0 Selected

Save Cancel

Add New

Now, you will fill out the fields.

- **Name:** Choose a name for the custom field that will be used to describe/identify what the custom field is being used for.

Charles And Helen Schwab, Joint (544) ▼

None

\$0.00

Account Value

SAVE CANCEL

Account

General

Change History

Model Assignment

Notes & Documents

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Quik!

Custom Fields

Account

New Field

Name

Type

Sequence

Code

Default Value

Include on

0 Selected

Save Cancel

Add New

Multi-line editor

List

Check box

Currency

Date

Date/Time

Integer

String

Double

Time

Long

- **Type:** There are 11 options to choose from for type
 - **Multi-line editor:** Provides the ability to provide a longer explanation/value
 - **List:** Create a list of the available options to pick from
 - **Check box:** Creates a true/false option
 - **Currency:** Option to add a dollar value
 - **Date:** Choose a specific date
 - **Date/Time:** Choose a specific date and/or time
 - **Integer:** Ability to input a number value
 - **String:** Open field where anything can be populated
 - **Double:** Ability to input a number value
 - **Time:** Input a time of hours and minutes to populate
 - **Long:** Ability to input a number value
- **Sequence:** Determine the order that the custom field should populate when looking at all of the various custom fields that have been created for a particular entity level. For example, if there are five different custom fields created at the household level, the sequence would control the order that all five custom fields would population.
- **Code:** This is an abbreviation you must create and enter in order to save the custom field. You will need this code to use with the new Salesforce sync.
- **Default Value:** Use this field if you want your document field to be checked by default or your product grouping automatically unassigned.

The screenshot shows the Orion Platform interface for account settings. A 'New Field' dialog box is open, allowing the user to create a custom field. The dialog includes the following fields:

- Name: [Text Input]
- Type: String (dropdown)
- Sequence: 35 (text input)
- Code: [Text Input]
- Default Value: [Text Input]
- Include on: 0 Selected (dropdown menu)

The 'Include on' dropdown menu is expanded, showing the following options:

- ☐ Portfolio Audit (Account)
- ☐ Billing Audit (Account)
- ☐ Grouping Manager (Account)
- ☐ New Account Center
- ☐ RMD Dashboard

Buttons for 'Save' and 'Cancel' are located at the bottom right of the dialog. In the background, the 'Custom Fields' section of the account settings is visible, with an 'Add New' button highlighted by a red box in the top right corner.

- **Include On:** Determine which apps within Orion the custom fields can be used in. For example, if you select “Portfolio Audit” then you can add that custom field as a column.

Once a custom field is created for a particular level, the custom field is then created for all options at that level. For example, if a custom field is created within one household, it then becomes an option for all households.

For more information on viewing, creating, and using custom fields, contact the Orion Platform Support Team.

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