

Custom Imports 2.0 Provides Improved Error Fixes, In-Line Editing



As an advisor, data maintenance probably takes up a large portion of your day in some way, shape, or form. Which is why we've always given you a quick way to mass import data into the Orion Connect—so you don't have to update each record individually, especially if you need to updates tons at a time.

But we'll be the first to admit that there are a few things that we simply lacked in our former custom imports solution—mainly better error prompting and the ability to edit data in-line directly within the custom imports tool. We'll walk you through how Custom Imports 2.0 solves for these pain points and more.

Previously, if you wanted to update records en masse, you needed to download a template, enter the data “correctly” in Excel, re-upload the file to Orion, and hope that you got it all right. If you didn't get the formatting just right, there weren't very explicit support messages in place to guide you to getting it all right. Then, you're back to square one and have to do it all over again.

With Custom Imports 2.0, we've made what was already good better. You can still choose to download a template from Orion and upload it just like usual. Here's where the change happens.

Once you've uploaded the document, it populates into a staging environment where you will be able to see errors in the fields and troubleshoot them. But you don't have to redownload the document, fix the errors, and then re-upload. Rather, you can fix the errors in-line, without the hassle. You'll get precise error prompting that lets you know where the issues lie so you can locate and fix them quickly. So, if you forgot to add transaction data, you'll get a message saying so

and pointing to the problem. And once you do fix your errors, you can validate the changes, and the error field will go away—letting you know you're good to go.

Is Excel Overrated?

Don't have your PhD in Excel? Well, you don't need to! Now, you can avoid having to download an Excel template by working directly in the staging environment. Here, you can start adding information from scratch into the template you choose, with dropdown choices on most of the rows that include smart searches across data within Orion Connect. This includes things like updating household data. Previously, you had to know the household ID and enter it in Excel. Now, in the staging environment, the smart search will automatically locate the household as you search for the name

Well, what about situations where you may need to edit data en masse or add an additional row of information? You don't need Excel for those tasks either. If you can move more quickly on-screen than in Excel, there's no reason you need to touch Microsoft Office's most complex product (in our opinion).

These changes give the you the ability to interact with your data in a more expansive way than ever before, saving you tons of time in the process.

How To Learn More

There are currently six custom imports in the new update, with plenty more rolling out in the coming days and weeks. If you use an import that is not yet available in the new tool, you can still link to the old tool.

Even better, if you do need support with the new system, there is an embedded training overlay within the custom imports solution that can walk you through how to best use the new functionality. And if you need them, there are helpful support articles to help along the way.

Not working with Orion yet? We'd love to start a conversation and show you what Orion can do to simplify your business. Let us know [here](#) and we'll give you a call right away!