

Displaying Quarterly Reports From Integration Partners



As quarter end approaches, you may need to pull together a variety of reports before meeting with clients. For your convenience, we offer integration support for quarterly reports, specifically, with eMoney and Wealth Access. In this week's Tech Tip, we'll show you how to run a quarterly report batch and link it to your preferred integration partner, eMoney or Wealth Access.

What?

Making sure your quarterly reports are clean and accurate is an important part of the client experience. By making a quarterly report batch, eMoney and Wealth Access can display your reports within a preferred integration portal.

How?

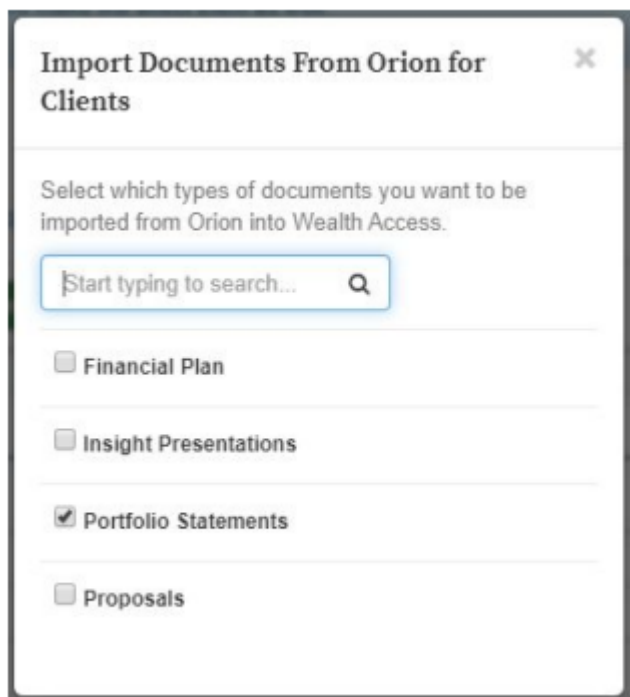
Making a quarterly report batch available to your preferred integration partner is relatively simple:

1. In the Report Batch app, set the Report Batch Visibility to Household.
2. The reports will be available for your preferred integration partner to access.

Report Batch I...	Household Name	Last Name	First Name	Viewable By
27330	Mike Unman	Unman	Mike	Household
27331	Sharie and Ronnie Bonds	Bonds	Sharie and Ronnie	Household

For eMoney, this will automatically give the eMoney system access to the Orion reports. For Wealth Access, you will need to tell the system to import the Report

Batch documents. You can reach out to Wealth Access for instructions on how to do this. The image below is the Wealth Access menu.



Import Documents From Orion for Clients

Select which types of documents you want to be imported from Orion into Wealth Access.

Start typing to search...

- ☐ Financial Plan
- ☐ Insight Presentations
- ☒ Portfolio Statements
- ☐ Proposals

It's important to note that each integration partner interacts with these reports differently. For instance, eMoney displays the reports as download links directly to Orion, so they don't actually store the reports, while Wealth Access actually downloads the reports to their system.

If you want to remove any reports from eMoney, you can update the visibility status of the report from Household to Advisor. For Wealth Access, you will need to manually remove the reports from the Wealth Access system, since they downloaded the reports.

If you have any questions or need help setting up partner integrations please contact integrations@orionadvisor.com.

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