Get Orion Insider Knowledge with the New Orion Support App

Here at Orion, our job is to make *your* job easier. We do that by creating technology that supports efficiency, enables scale, and helps your firm drive toward measurable improvements in your client experience and operational workflows.

In our November Software Update, we took our support a step further with the rollout of the new Orion Support app, previously known as Orion Social.

Orion Support will streamline the way you interact with Orion's subject matter expert teams and help you find the information you need much more quickly.

In this post, I'll cover what has changed and how to begin enjoying an even better experience with our support team!

Enhancing Your Orion Support

If your Orion Connect landing page was set to Orion Social, you've been automatically switched to Orion Support. The new app brings an entirely new look and feel to your landing page experience with three key updates:

1. **Orion Support is Now a Native Orion Connect App:** Orion Support is now an Orion Connect app, aligning your navigation experience to create a more streamlined and functional user experience as you navigate from one app to the next.
2. **Simplified Search for Training Materials:** All help articles, webinars, Ascent courses, PDF Documents and other training materials have been combined into one prominent search feature that allows you to filter by

team or training type from wherever you are.

3. **Access Orion Support From the Main Menu.** When you need to get a hold of an Orion expert, you can simply click on the "Contact Us" menu, and choose to go to the Orion Support page to create a new case, initiate a chat, or call by selecting a support team.
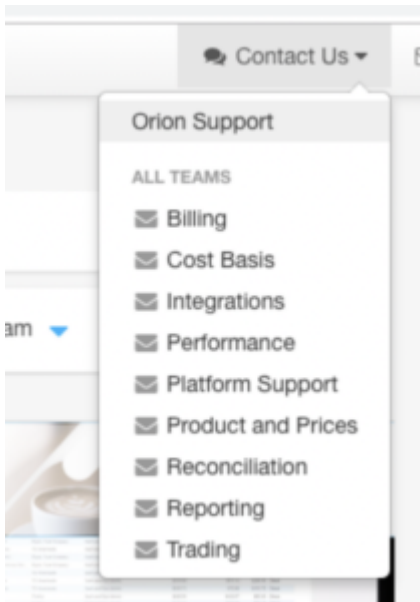
On top of those three key updates, Orion Support also includes a **Top Apps drawer** that gives you new options for displaying your favorite apps and the ability to submit **Employee Recognition** for those times when an Orion team member goes above and beyond the call of duty.
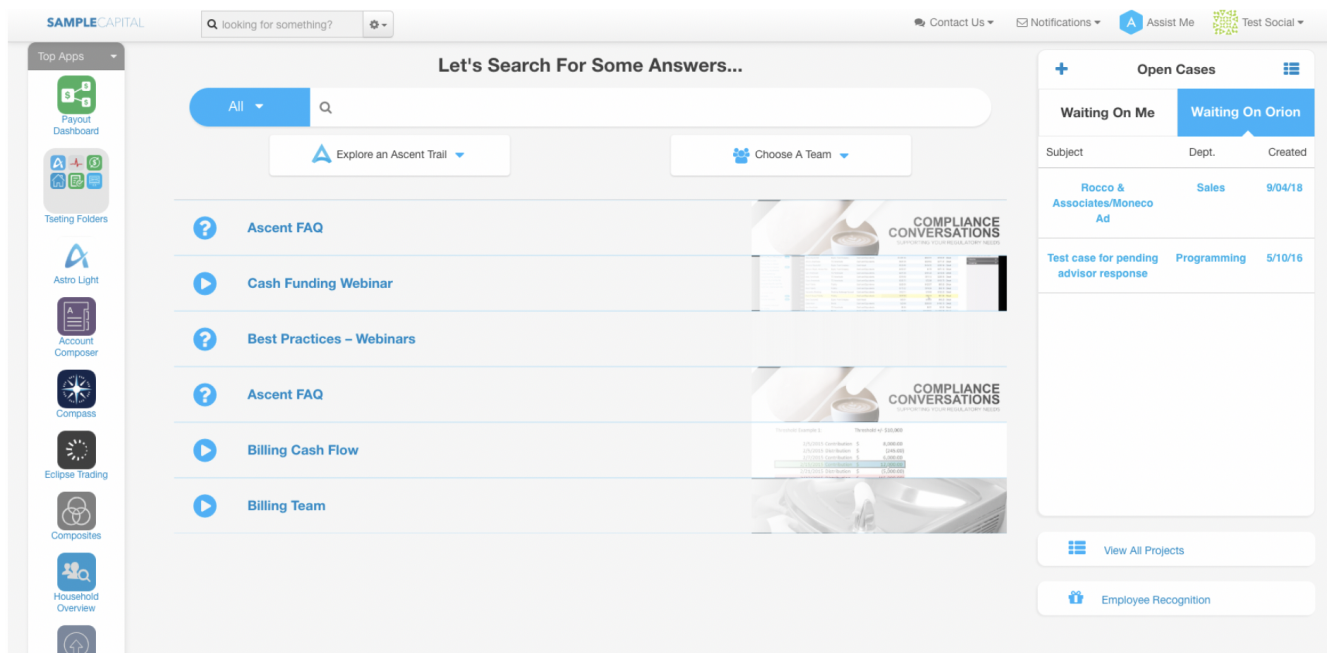
The story of Orion Support isn't all in the new and updated, though. We're also keeping all the most-loved elements of Orion Social.

Curious what those are?

Maintaining and Enhancing Existing Functionality

When we decided to create Orion Support, we knew that it was important to identify and keep all the parts of Orion Social that so many of our advisors loved so much.

Rest assured that these critical features from Orion Social will continue within Orion Support:

- **View all currently open cases by status** so you know what's waiting on your team and what's pending. We've added the ability to view your chat transcripts directly from the case!
- **Use our case templates** to ensure you send the Orion team all the information required to get you back a resolution to your question as quickly as possible
- **Security enhancements to new case messages** include further protecting your messages by posting them directly on our internal case through our API rather than via email. You'll receive an email notification when a new case message has been posted to the case.
- **Get a look at all the support requests** you've filed over the years, look up an answer you received last month, all in one simple view
- **View all open new development projects and suggestions**

Create A New Case

= Required Field

Service Group:

Reporting ⇕

Case Type:

Data Query Request ⇕

Subject *:

Existing Query Starting Point *:

Filters *:

Prompts *:

Start Date *:

End Date *:

Columns *:

Description *:

SAMPLECAPITAL   🔍 looking for something?   ⚙ ▾   💬 Contact Us ▾   ✉ Notifications ▾   Ⓐ Assist Me   🔲 Test Social ▾

← Support · All Projects

| Projects | Suggestions |

Filter...

Name	Number	Status	App	Contact	Date Created	Last Modified	Closed Date	Columns
Communities link doesnt immediately work...	Project 118573	Prioritization Needed	Communities	Scott Klusaw	06/05/2018 10:36:44 AM	10/17/2018 11:58:12 AM	10/17/2018 11:58:12 AM	
Partial import failures on "Up to date with C...	Project 118057	Estimate Pending	Eclipse	Scott Klusaw	05/29/2018 2:09:28 PM	10/17/2018 11:58:12 AM	10/17/2018 11:58:12 AM	

The improvements to Orion Support will create a more unified experience for you

when using all the apps in Orion Connect and help you find the resources and support you need in less time than ever.

Log into Orion Connect now to try out all of Orion Support's new features.

Not working with Orion yet? Click here to get in touch with us.

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