

Integration Update: CRM Simplified with Orion + Salesforce Enhancements



For many advisors, their CRM has become the hub of their technology stack due to its ability to streamline workflows and provide a single place to centralize client data. In fact, a recent technology survey found that 42% of responding advisors listed their CRM as their most valuable tech tool. So for firms and advisors who are equally as reliant on their portfolio management technology, integrating our solution into the industry's most popular CRMs—including Salesforce, Redtail, and Junxure to name just a few—further streamlines operations with the ability to complete tasks in both apps from within their CRM.

As part of our commitment to creating technology that supports advisors in whatever way they work best, our May Software Update will enable new ways to integrate Orion Connect with your Salesforce CRM, including with their new Salesforce Lightning Experience.

Pro Tip: *To benefit from these new enhancements, your firm's Salesforce System Administrator will be required to take action in Salesforce. We'll provide instructions on how to do that later in this article.*

A Look at Orion Connect in Salesforce Lightning

The biggest enhancement to our integration is that for the first time, Orion Connect will be available to Salesforce users that have enabled the Lightning Experience. Orion Connect was previously available only to Salesforce Classic and

Financial Services Cloud users.

Salesforce Lightning, their latest interface, provides a more customizable and intuitive user experience than Salesforce Classic. If you'd like more information on how the two user interfaces differ, Salesforce has released a helpful article [here](#).

While you'll still be able to access these updates if you're using Salesforce Classic, if you've been waiting to transition to the Lightning Experience until your Orion Connect experience could come with you, now is the perfect time!

Orion Connect in Salesforce allows you to view the full Orion platform without leaving your CRM application, plus take advantage of more great features, including:

1.New Orion Links from Salesforce

Contextually single sign-on into Orion Connect from any Household or Financial Account record in your Salesforce org. Based on the data you're viewing in Salesforce, these Quick Links will take you to the appropriate portfolio in a corresponding Orion Connect app. This functionality existed previously, but we've enhanced the features to match Lightning's new look and feel for a consistent experience.

2. Easier Access to the Insight Dashboard

Orion's Insight dashboards can now be displayed within Salesforce on a Household or Financial Account record. Use the Insight app in Orion Connect to create a Portfolio Level dashboard that can be seen directly on the records within Salesforce.



How to Update Orion Connect for Salesforce

If you're using Orion Connect through Salesforce Financial Services Cloud, your version already has all the features discussed in this article. Congrats!

However, if you're using Classic or Lightning, you'll want to review the steps below.

Each version has its own set of steps that will help you gain access to the newest features. Read more about enabling the integration enhancements in the user guides linked below:

1. First open Orion Social
2. Then click below on the version your firm uses for access to a specific user guide
 - Salesforce Standard
 - Salesforce Purchased Through TD Ameritrade
3. Follow all the steps within these guides to complete your setup

Reminder: You must be a System Administrator within your firm's Salesforce org to install the new Orion Connect update.

If you aren't sure which version your firm uses, please contact our Integrations SME team for assistance through the Orion Social app. Click **Contact Us** and find the Integrations Team to begin a new chat.

Connecting Orion to your CRM is just the first step in helping your team become more efficient with how you use technology in your office. Don't wait to make the most of what this integration update has to offer.

Questions about what we covered in today's blog? Contact our Integrations SME Team by logging into Orion Social.