

How the Orion Integrations Center Makes Integration Simple



The integrated technology systems you use in your everyday practice have a large impact on your growth. When it comes time to establish a new integration, we decided we could do more to make it simple and clear to you on how Orion hooks into other apps and make the decision process for our advisors a little easier.

With our most recent Software Update, we've built a new tool to give you all the information you need about Orion's integration partners, in one simple place. You can find all things integrations in the new Integrations Center app in your Orion Connect.



Integrations Center

In this post, we'll explore new features and the functionality so you can best utilize the Integrations Center.

Explore Our Integrations

When you first open the Integrations Center app, you'll find a list of available integrations, ordered alphabetically.

We've presented the integrations as tiles. Each tile contains the name of the


integration partner, their logo, a short summary of what you can do with each, and a link to open up a new window with additional information about that integration.



When you click the “Learn More” link, you’ll be taken to a dedicated page for that integration partner so you can more easily perform your due diligence when you’re deciding between systems you want to implement, and how they interact with the Orion platform.

Dedicated Pages for Each Integration Partner

Once you click Learn More, you’ll see a dedicated page for your chosen integration partner. The content on these pages is provided by each partner so you can be confident the information is accurate and up to date.



AdvisoryWorld provides Asset Allocation, Portfolio and Investment Analysis, Proposal Generation, Hypothetical Illustrations, Workflow and Document Management, and Financial Planning Software Applications to investment professionals including Registered Investment Advisors, Wealth Managers, Broker Dealers, TAMPs, Banks and Insurance Companies.

Orion Integrates with AdvisoryWorld's Scanalytics Research and Reporting platforms. Additionally, new households and accounts captured by AdvisoryWorld's Proposal platform are created in Orion's New Account Center for review and management.

www.advisoryworld.com

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Integration Points:

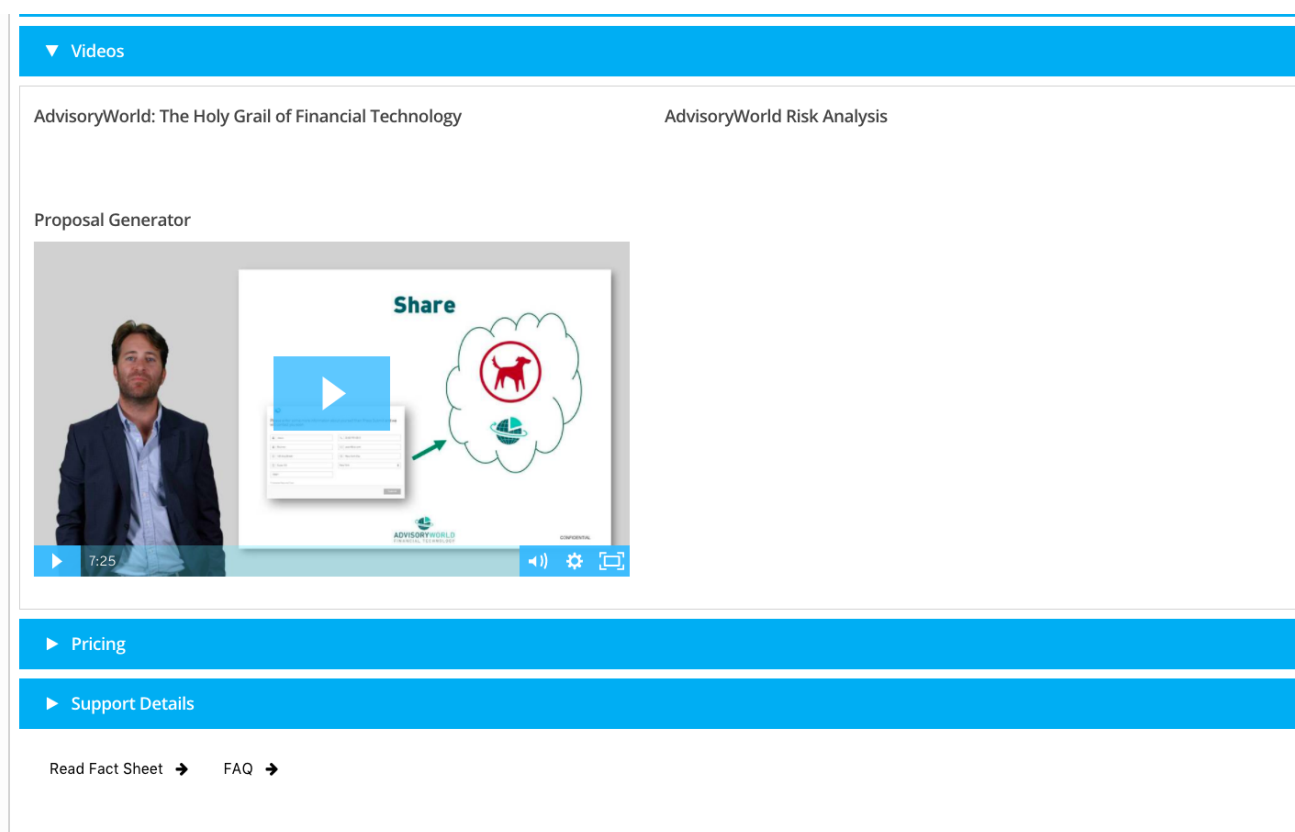
- Features from AdvisoryWorld are available in the Orion Client Portal.
- Orion provides AdvisoryWorld access to Client data through our API.
- New accounts captured by the AdvisoryWorld Proposal Tools will push into Orion's New Account Center.
- AdvisoryWorld sub-reports can be added to Orion Report Builder Reports.
- A Single Sign-on AdvisoryWorld App in Orion Connect.



On this page, you’ll find a summary description of the company with a link to their website and a quick view into the integration points you’ll enjoy with Orion if you select that integration. You’ll also see badges for special integration criteria—is

this integration partner a member of Orion's Fuse community, does Orion resell their services, and does Orion provide Tier One support for this integration.

As you scroll down the page, you'll be able to view more information and get a real sense of what the integration you've selected will bring to the table. View software screenshots, any tutorial or marketing videos posted, and also get a look into pricing and how to get your integration set up under Support Details.



Getting Started with the Orion Integrations Center

If you don't already see the Integrations Center in your Orion Connect, it's simple to get up and running.

You can enable this new app in your Manage Users app > Roles. From there, you can enable the app for all the users in your firm who should have access to this information.

The Integrations Center will make it easy for your firm to discover more information about who Orion integrates with and how that integration can benefit your firm. We're excited to share this new app with you and as always, we'll be

updating it as more and more integration partners are added to the Orion platform.

If you have any questions about the content covered in today's article, please contact our SME Integrations Team via the online chat in your Orion Social app.

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