

# Efficiency and Flexibility: Orion and Salesforce Take Partnership to the Next Level



From our inception, it's been our goal to provide financial advisors with the tools they need to better serve their clients, simplify their operations, and ultimately, grow their businesses.

That means doing two things: continuing to innovate to the best of our ability, and partnering with industry-leading applications to build a truly comprehensive tech stack for our advisors that allows them to run their businesses the way they want to.

So it makes sense that Salesforce, a global CRM leader, is one of our longest-standing integration partners. Our relationship with Salesforce empowers advisors to become their clients' true financial wellness partners through trust, transparency, and convenience.

And like any strong relationship, it continues to grow. Here's what's changing:

## Flexible Field Mapping

**What you're accustomed to:** Data from Orion Connect can only be mapped to default fields in Salesforce.

**What's new:** You can now map Orion data to custom fields created in Salesforce based on what you want to see in Salesforce. For example, if you have custom objects, data fields, or workflows which you have created to benefit your firm, you can now point the Orion synced data to the Salesforce field of your choice.

**Why it matters:** Flexible field mapping gives you even more flexibility and control over your data. You get to decide where that data is most valuable, so you can organize, find, and retrieve it more efficiently, putting them in the driver's seat and empowering them to make the changes necessary to reach their goals.

## Data Syncing

**What you're accustomed to:** Currently, there is a full sync of your data each morning, in addition to delta syncs, which sync data that was recently changed or updated. The delta syncs run every 10 minutes, but they cannot be manually triggered.

**What's new:** Now, on top of your full sync every morning, you can run a full sync whenever you need it, giving you the flexibility to have your data at your fingertips. For example, if you need your data to be synced in between your delta sync schedule, you have the ability to trigger a full sync.

**Why it matters:** You now have the ability and flexibility to run your data on your terms. Unfortunately, that'll probably mean less talking with us, but on the flip side, it means more time for you. And we all know time is money.

## Error Fixes

**What you're accustomed to:** If there is an error in your data, chances are you have to call someone to fix it. That takes time and energy.

**What's new:** Say hello to independence. You can now fix errors on your own through error message prompting and relevant support documents.

**Why it matters:** There's no longer a need to wait for a support team resolution. Should an error occur, you can fix it quickly—and on your own terms. We'll provide plenty of support documentation, instructional prompts, and troubleshooting assistance to ensure the smoothest experience possible. The power is back in your hands.

To learn more about the exciting enhancements to our Salesforce integration, watch a recording of our webinar.

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!

0959-OAS-9/20/2019