

# Orion Support Has a New Look, Enhanced With Extra Security and Transparency



Providing great support is not something Orion strives for; it's our baseline. We know that timely support is absolutely necessary for you to run your business in an efficient and effective manner. We're proud of the great support we provide to our clients day in and day out.

Our goal is to get your questions asked as quickly as possible, but we cannot compromise security to do so. That's why we've made changes to the way you interact with Orion Support to achieve both efficiency in support and effectiveness in security.

## Email Changes

Security is paramount to us at Orion. With the nature of our business, sometimes there is sensitive information sent back and forth. We need to make sure that sensitive information stays in the intended hand. It is for that reason that as of March 1, we are *no longer accepting emails* as a way to submit support cases.

Instead of emailing us with what you need help with, everything will be done on the Orion platform in a variety of ways, through both live support and cases. We are excited about this change, as it will enhance the security of your data.

## Live Support

Chances are, you're already doing this. That's why we're not changing anything when it comes to calls or chats. You still go to the same place: Orion Connect >

Contact Us > Select your team > Choose to chat or use computer audio/phone. This method is best for technical support, urgent requests and quick questions. We offer co-browsing for the best engagement and accept most file types in a chat session for ease of use.

## Cases

To request support help during off hours—or for the more complex, research-intensive questions—cases are the way to go. We recently redesigned our support cases to reflect what they really are: conversations. More on the design and security changes to cases can be found below.

As of March 1, Live Support and Cases are the only two ways you will be able to interact with the support team.

## Refreshed Design

As we mentioned above, we've made design changes to Orion Support cases. Cases will be shown as back and forths, with emails sent to the person who submitted the case and (any other stakeholders) when the case is updated.

The old interface, while useful, did not visually show the back and forth in an easy-to-understand way.

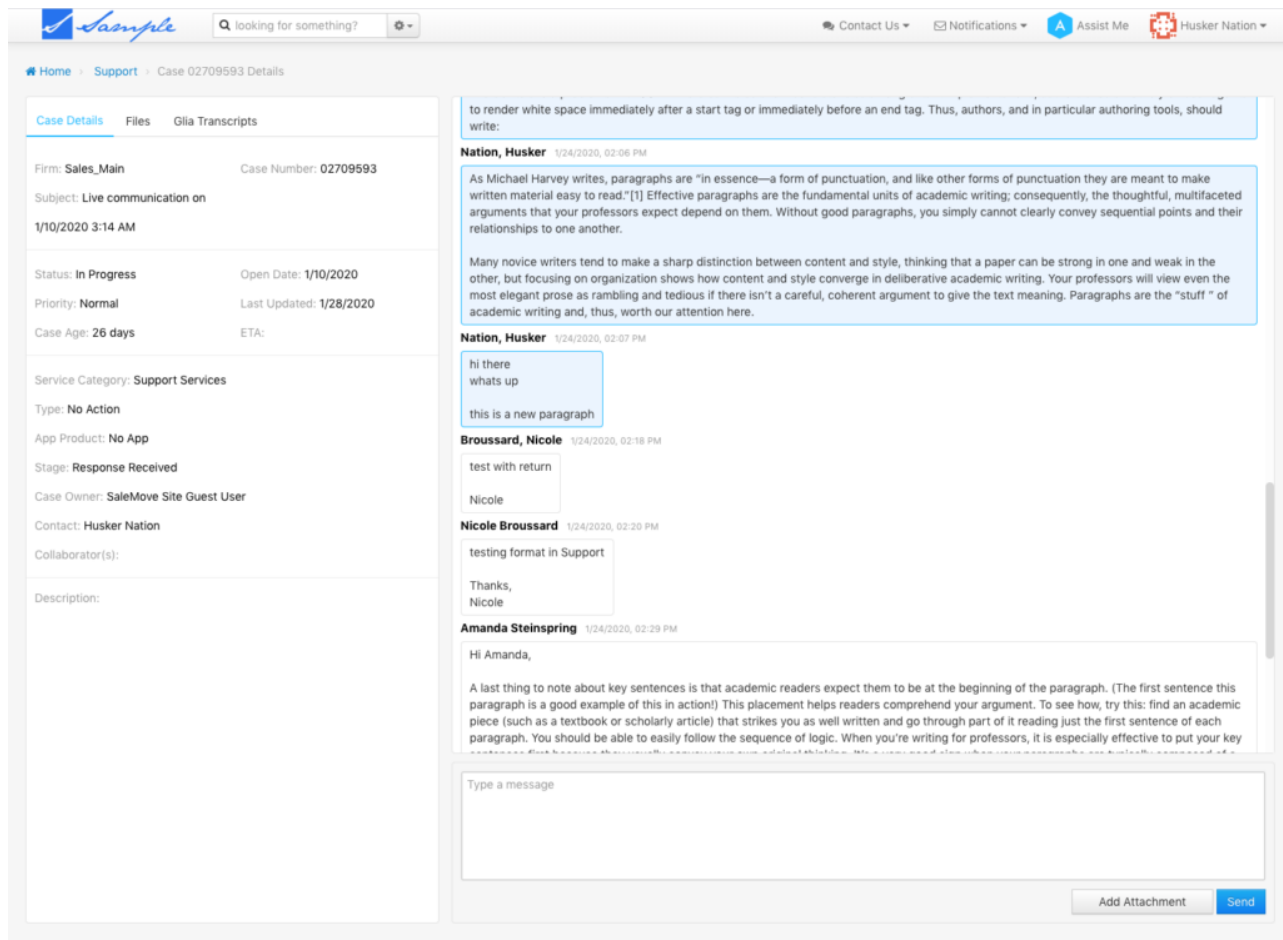
The screenshot displays the Orion Support Cases interface. At the top, a header bar contains four tabs: Subject, Case, Status, and Priority. The Subject tab is active, showing 'Live communication on 1/22/2020 11:32 AM'. The Case tab shows '02725273', the Status tab shows 'New', and the Priority tab shows 'Normal'.

Below the header, the case details are organized into two columns. The left column lists: App, Type, Department (Other), Case Owner (SaleMove Site Guest User), and Contact (Husker Nation). The right column lists: Open Date (1/22/20), Last Update (by SaleMove Site Guest User at 1/22/2020, 11:33:42 AM), ETA, and Case Age (13 Days).

The main section is titled 'Case Messages' and contains a large text area for the conversation. The message history shows a timestamp of 00:00:01, the name 'Rigel', and the text: 'Hi. I'm Rigel, Orion's Virtual Assistant. My job is to help you get to the right team right away so you don't have to be transferred. Once you get to a live person you can upgrade to phone/audio if you prefer. Do you need help with one of the apps below?'. Below this, a timestamp of 00:00:06, the name 'Nation, Husker', and the text 'Other' are visible. At the bottom of the message area, a link says 'Something else ok. Tell me what app you are contacting us about or what your question is'.

Below the message area, there is a 'New Message' section with a text input field and a 'Send Message' button. To the left of the 'Send Message' button is a 'CC Contacts' dropdown menu showing '0 Selected'. At the bottom left, there is an 'Upload Attachment' button. At the bottom right, there is a 'Close' button.

With the update, you can see exactly who is saying what, when, and in a way that's familiar to your everyday life.



The screenshot displays the Orion Support web application. The top navigation bar includes the 'Sample' logo, a search bar, and links for 'Contact Us', 'Notifications', 'Assist Me', and 'Husker Nation'. The breadcrumb trail shows 'Home > Support > Case 02709593 Details'. The left sidebar contains tabs for 'Case Details', 'Files', and 'Gila Transcripts'. The 'Case Details' tab is active, showing a form with the following information: Firm: Sales\_Main, Case Number: 02709593, Subject: Live communication on 1/10/2020 3:14 AM, Status: In Progress, Open Date: 1/10/2020, Priority: Normal, Last Updated: 1/28/2020, Case Age: 26 days, ETA: , Service Category: Support Services, Type: No Action, App Product: No App, Stage: Response Received, Case Owner: SaleMove Site Guest User, Contact: Husker Nation, and Collaborator(s): . The main content area shows a message history. The first message is from 'Nation, Husker' on 1/24/2020 at 02:06 PM, containing a paragraph about white space and a paragraph about paragraphs. The second message is from 'Broussard, Nicole' on 1/24/2020 at 02:18 PM, containing a short message 'hi there whats up' and a new paragraph 'this is a new paragraph'. The third message is from 'Nicole Broussard' on 1/24/2020 at 02:20 PM, containing a message 'test with return' and a signature 'Nicole'. The fourth message is from 'Amanda Steinspring' on 1/24/2020 at 02:29 PM, containing a message 'Hi Amanda,' and a paragraph about key sentences. At the bottom of the message history is a text input field labeled 'Type a message' and two buttons: 'Add Attachment' and 'Send'.

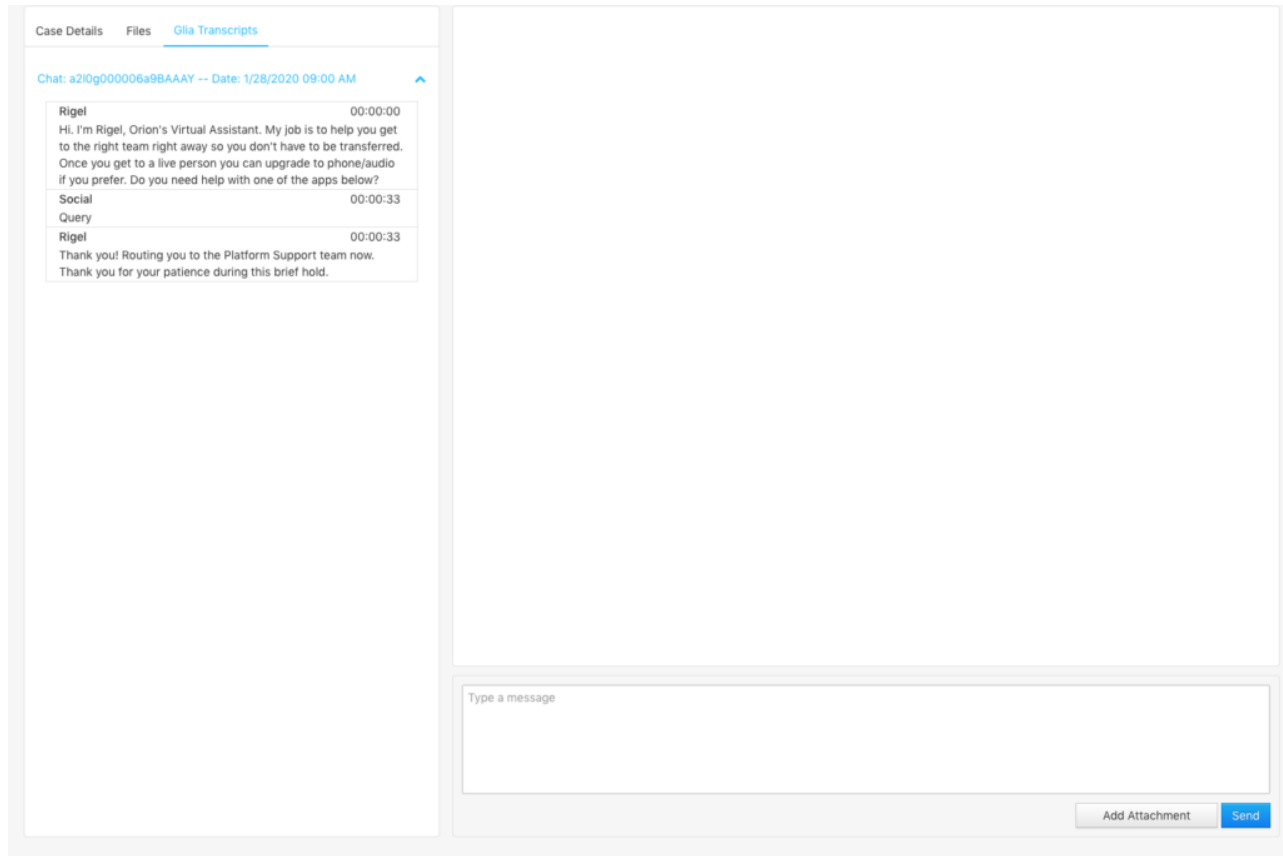
## Enhanced Security

Not only does Orion Support look better than ever, but we've built in more security so your sensitive files are safer when being sent for review. Rather than using our Secure Exchange app to send files to Orion, you can upload encrypted files right on your case, so only the desired recipient is able to access the information.

This eliminates extra steps of using a separate file sharing app while preventing PII from being sent to the incorrect person or falling into the wrong hands inadvertently. It is also the why behind why we will no longer be taking support requests via email.

# Detailed Records

What's more, when you chat with our support team, those transcripts can be accessed and downloaded for safekeeping. Those transcripts will be attached to the case number that is created when you chat the support team and can be found by going to Orion Support and clicking the all cases link.



If your compliance team needs access to your case message history, you can go to the All Cases view from the Cases widget, right click on the case(s) you need to export, and select Export. All your support is documented and kept so you can find it should you ever have a similar question or forget the answer (it happens to everyone).

And of course, you can always search for answers by clicking on the information icon throughout our site for in-app help articles and FAQs.

Our commitment to supporting your business is unending and unrelenting, so your success can be the same.

*Current Orion users: Contact [success@orion.com](mailto:success@orion.com) or 888.279.8447*

*Not already using Orion? Contact [empower@orionadvisor.com](mailto:empower@orionadvisor.com) or 402.496.3513*

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