Communicating with Clients Just Got Better with the Newsfeed Feature


In the virtual world of 2020, communication is more important than ever before to maintain relationships and grow businesses. Trading in those valuable face-to-face meetings and conversations for emails, messages, and video chats has come with a learning curve for many of us. Luckily, the tech we use has been rising to the occasion to facilitate deeper connections with our clients and continued growth for our businesses.

Your Orion tech is no exception. We are excited to introduce the Client Portal Newsfeed, giving you another line of communication with your clients. Read on to learn about the features of this new release.

What is the Newsfeed?

Coming on September 28, the Newsfeed will be in the sidebar of the new Client Portal, as shown in the screenshot below. You can use the Newsfeed for any communications such as links to quarterly statement uploads, event-based notifications, custom RSS feeds, video market commentary, and more. Clients will see the Newsfeed on the homescreen after they log in, ensuring your posts are one of the first things they see.
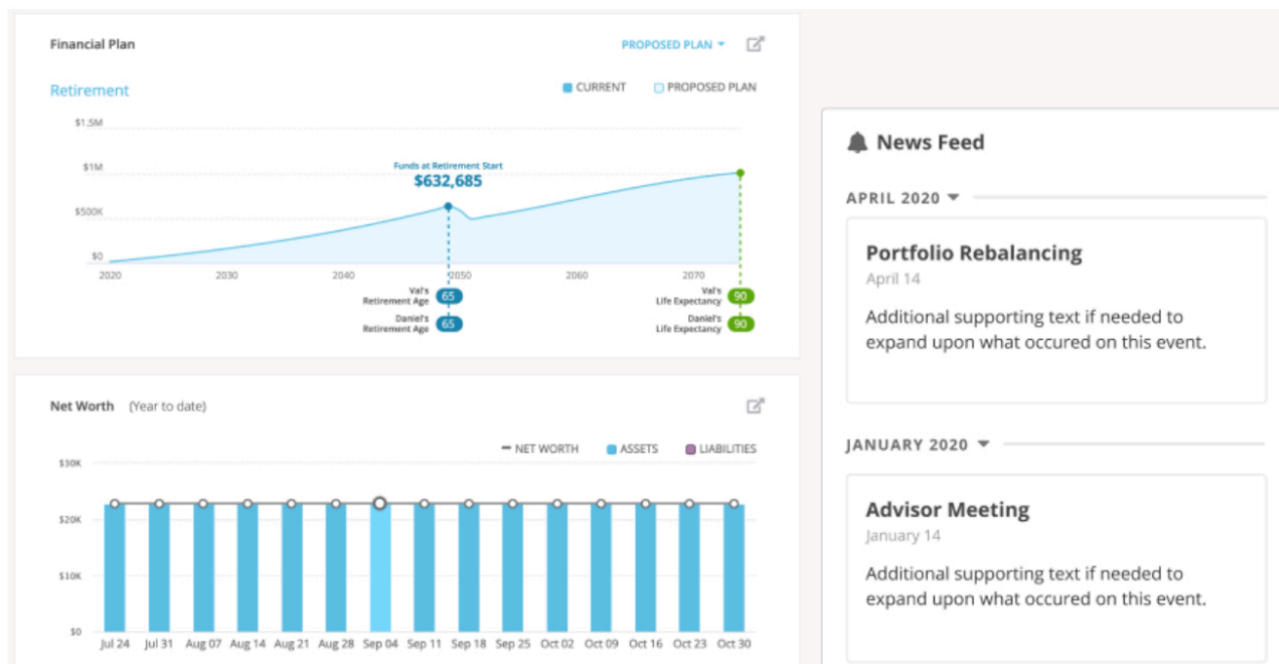
Elements of a Newsfeed Post

We developed the Newsfeed with flexibility in mind, so that you can manage your feed and content in a manner best suited for you. The following features are available when creating a Newsfeed post:

- **Get your main point across** – write the message you would like to post and add any supporting links. Keep it short and simple.
- **Determine your audience** – send the post to all of your clients or target specific individuals. The more you can customize your message to your audience, the better.
- **Choose the best time**– select whether you would like your Newsfeed post to publish now, or set it to go live on a later date. Try to post during times when you know your clients are online.
- **Save it for later**– save a draft for when you are still editing and want to come back to it later. WFH distractions? Save a draft and come back later with fresh eyes.
- **Keep your content fresh** – use the custom RSS feed functionality to bring in the latest updates from a news site, blog, or other relevant source.

In addition to writing your own posts that will show up in the Newsfeed, posts will

automatically publish to the Newsfeed when you upload a new statement to the Client Portal and when a new event-based notification is added.

How Do I Get Started?

To control the newsfeed posts, head to the *Client Experience* app. This is where you will create new posts and remove current posts, if needed. Ensure that you have access to the *Client Experience* app by enabling it in the *Manager Users* app, under the *Role* tab. The Newsfeed will not appear on the Client Portal homepage until your first post has been created.

Learn more about the Newsfeed feature in the Client Experience App Overview document from the Orion Support team.

Not working with Orion yet? Sign up for a demo here.

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