

Product Creation is Now in Your Hands!



At Orion, we're all about providing custom tech solutions to help you grow your business. Now, we're putting the power of customization in your hands! In this week's Tech Tip, we'll show you how to build your own products in the Products and Prices app.

What?

Do you need to create and maintain a custom index or benchmark? Or maybe you want to manually manage an SMA product? How about a custom placeholder asset? Using the Product and Prices app, you can do it all, and we'll show you how!

Why?

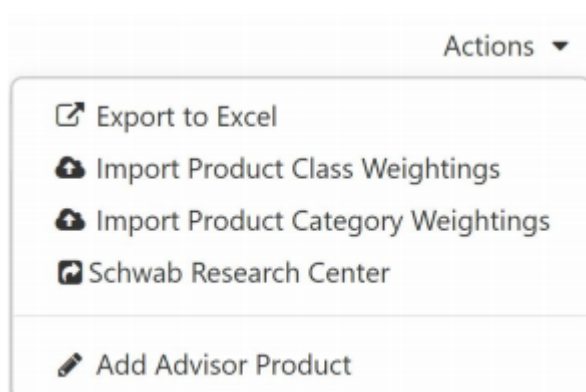
In the past, new products were created by a member of the Products and Prices team — potentially resulting in duplicative efforts if members of the Orion team and Orion advisors were both entering product specifications for the same request.

To improve the product creation experience, we've added tools to the Product and Prices app and in the Account Composer app that allow you to create products in our system for your own database.

How?

To create products in the Products and Pricing app:

1. Launch the Products and Pricing app.
2. Navigate to “Search Local Products.”
3. In the “Actions” drop-down, click “Add Advisor Product.”
4. From there, click the “Global” tab.
5. Now you can fill in the product details.



Helpful Resources

If you’d like to dig deeper into the Products and Pricing app, we have several post-login resources to help you on your quest!

Check out our Creating Manual Products webinar.

To see how to set up products as indexes, be sure to read “Manual Benchmark Creation and Maintenance”.

Or for a broader look at how to use the new products you create on the Orion platform, check out “Adding a Manual Product to an Account as an Asset”.

More Learning Opportunities

Is your billing process ready for quarter end?

Join our webinar, “Prepare for Quarter End Billing” on June 27th, to learn how to run a billing forecast, reconcile audit files, and gain the essential tools you need for a successful quarter-end billing process!

If you have questions or need additional assistance, feel free to contact our Products and Pricing team at productprices_fixedincome@orionadvisor.com

0624-OAS-6/17/2019