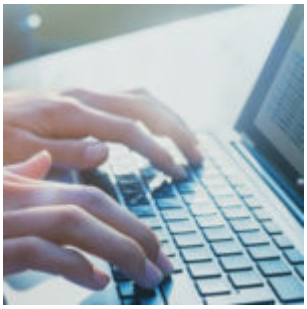
Five New Customization Features to Try in Report Builder 3.0



With the role that technology plays in our lives every day, the need to personalize experiences has become not only commonplace, but expected.

If you have a Google Home device in your kitchen, it recognizes your voice versus your spouse's voice and tailors its answer appropriately.

Your Netflix account learns what types of shows you watch regularly and adjusts its recommendations to better fit your viewing profile.

Your clients receive personalized experiences everywhere they go and they should get the same from you—their financial advisor—as well.

The new Report Builder consolidates our reporting suite into a single app, includes new features to make custom report creation time-efficient and intuitive, and empowers you to provide more individualized client experiences.

Here are the top five Orion Report Builder 3.0 features (in no particular order) we can't wait for you to experience when the app goes live in December 2018.

1. Change Column Widths Dynamically

In Orion it's always been easy to add the sub-reports you want and to position them in the right place, but Report Builder 3.0 makes it even easier to get the exact look and placement you want.

Dynamically changing the width of sub-report columns can now be done on-the-fly with on-screen actions. It's as simple as clicking and dragging from the edge of a sub-report to where you want the column to reside on the page.

The data within the column will also dynamically adjust to fit the new dimensions.



2. Format Sub-Reports with Drag-and-Drop

You may notice a theme throughout this post about the new Report Builder's ease of use. We've extended that focus to how you format sub-reports to fit together on each page.

Simply click a sub-report, then drag it to a new location to reformat your page and give it a style all your own.



3. Customize Tables with Dynamic Tags

At some point in your Orion report-building career, you've probably seen a sub-report that you liked, but you wanted to swap out one of the columns for another data point.

In the past, you would have had to request a new version of that sub-report, and Orion's development team would have gotten to work.

With the new Report Builder 3.0, you can make those adjustments yourself with Dynamic Tags. Click in a column while building a report and you can search for a new data point you'd like to display.



4. Add Images Anywhere with a Click

Sometimes you want your report to have a little more pizazz. Maybe it's important to include a logo in-between sections, or you have a specific image to include for a certain client.

For those times when a visual element is needed, we've created an approach to

adding media that's more in-line with the web standard you'll experience on most websites.

Report Builder 3.0 includes a dedicated **Media** button that you can click at any time to add in an **Image** section to your report and from there, adding a visual is only one click away.



5. Add, Move, or Delete Columns with On-screen Controls

The most time-efficient aspect of the new Report Builder is that all the customizations you need can take place on one screen, while you're choosing your sub-reports. There's no complicated walk-through wizard or multi-step process; all of our new personalization features are available, all at once, for an easier report-building workflow.

Right-click on column headers for a list of new actions you can take, all on-demand and on-screen. You can delete columns or insert a new one, as simply as you would while interacting with a spreadsheet.



When your custom-report workflow goes through Report Builder 3.0, your entire team can build a more robust and informative client experience, and save time doing it.

Sign up for one of our upcoming webinars to see how your firm can achieve a 50% efficiency gain with Orion's reporting suite!

Don't work with us yet? Click here to talk to our sales team and schedule a personal demo.

0579-OAS-11/6/2018