

Sharing Case Messages with Additional Contacts



At Orion, we believe in having complete transparency with our advisors, which is why all open support cases are available for you to track in the Orion Support app. In this week's Tech Tip, we'll explore Orion's communication process for support cases, and how you can securely share case messages with a third-party.

What?

When new messages are posted on a case from Orion support, rather than sending the message via email, a secure message record is created and posted to the case in Orion's Salesforce system. The recipient(s) of the message will receive an email notification containing the case number and a link to log into Orion Support to view the message.

After Orion's May 2019 Product Release, you can now include additional contacts to receive email notifications anytime the case is updated with a new message. This is the equivalent of "cc'ing" another party on an email.

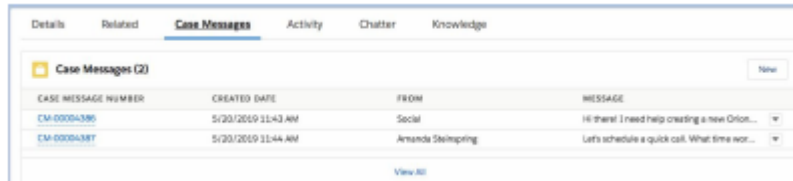
Why?

This security enhancement prevents PII (Personal Identifiable Information) such as client names and account numbers from being sent via email. Instead, the messages are passed securely through Orion's system.

How?

Case Messaging Workflow:

1. You post a new message to a case in Orion Support.
2. The Orion case owner will receive an email notification stating that a new case comment has been posted.
3. The Orion case owner will locate the case in Salesforce and click on “Case Messages” to view the message.

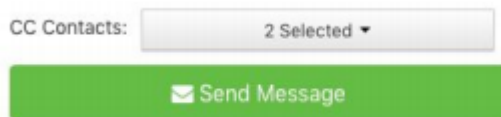


CASE MESSAGE NUMBER	CREATED DATE	FROM	MESSAGE
CM-00004395	5/20/2019 11:43 AM	Social	Hi there! I need help creating a new Orion...
CM-00004397	5/20/2019 11:44 AM	Amanda Skinspring	Let's schedule a quick call. What time not...

4. The Orion case owner will reply by creating a new case message in Salesforce.
5. You will receive an email notification that a message has been posted with a link to log in and view the case.

To add CC Contacts on the case:

1. Navigate to the Orion Support app.
2. Open the app and navigate to “Messages.” Only users with access to cases will be able to add CC Contacts.



3. Input the contact information for the new recipient.

Well, that was easy! Now, additional parties like a broker-dealer or practice partner can securely receive messages from the Orion Support Team.

If you have questions or need additional assistance, feel free to contact our Platform Support team: platform@orionadvisor.com

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