Six Ways Query Builder Will Improve the Way You Work



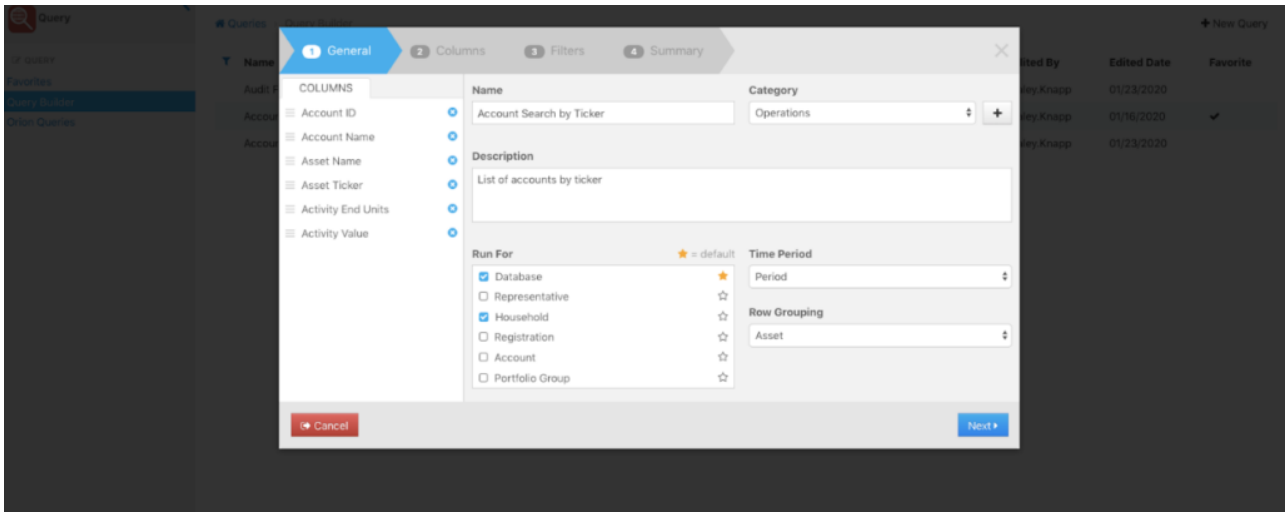
At Orion, our mission is not just to make advisors' lives simpler. It's to empower them with the tools, resources, and solutions they need to work the way they want to. With Query Builder, we've done just that.

Data queries are essential to running a successful advisory firm; from both a reporting and a compliance standpoint, you need consistent access to clean, timely data. And while you've always been able to run data queries using our Data Query app, you've been missing the ability to create custom queries to retrieve exactly the data you need on your own terms.

But now you have Query Builder, your solution to true data query customization. Check out six new ways Query Builder puts the power of accurate, relevant data in your hands.

1. You can create brand new queries based on exactly what you need

While Orion has created thousands of unique data queries to help you interpret your data exactly the way you want to, we understand that we can't anticipate your every data need. So we're giving you the power to create and run your own queries.

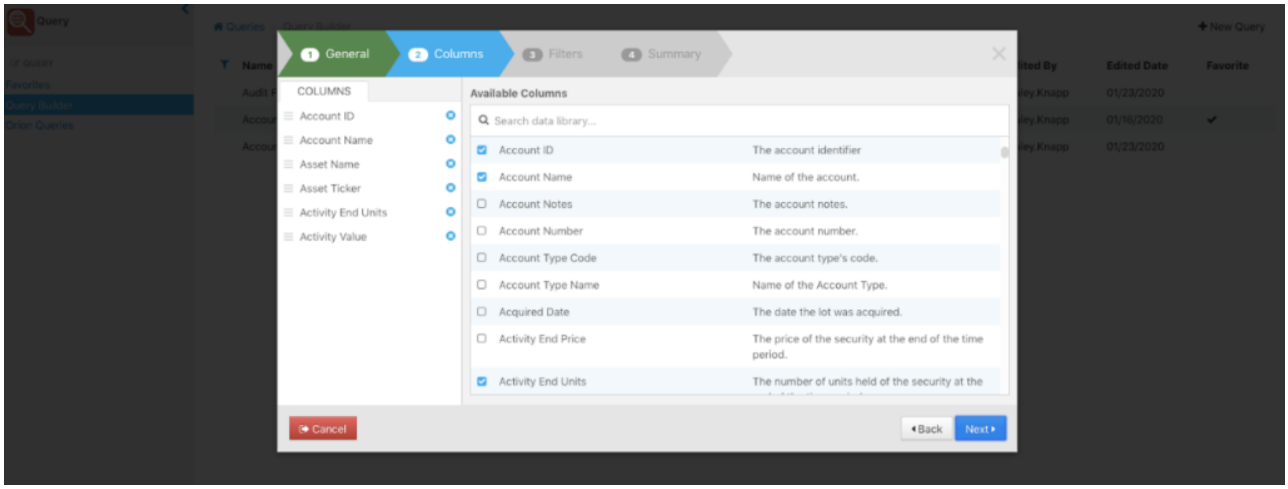


2. You can customize your queries by grouping, column, prompts, and filters

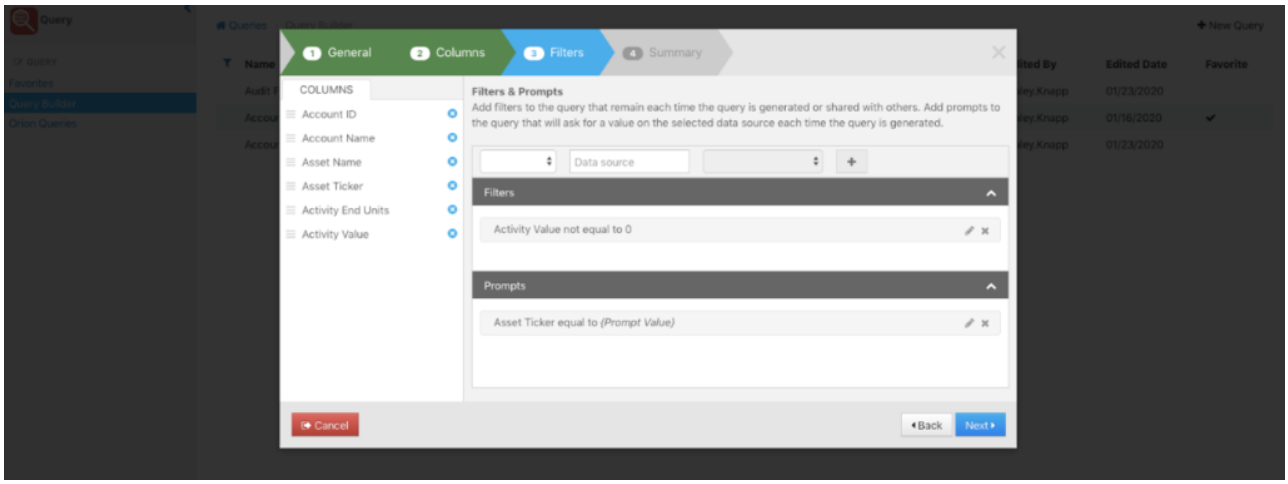
Once you determine which specific data points you want to analyze, you can set them up with grouping, column, and condition options.

A grouping determines the base level of the query: asset, household, account, transaction.

Columns display the desired data points: values, household information, and custom fields.



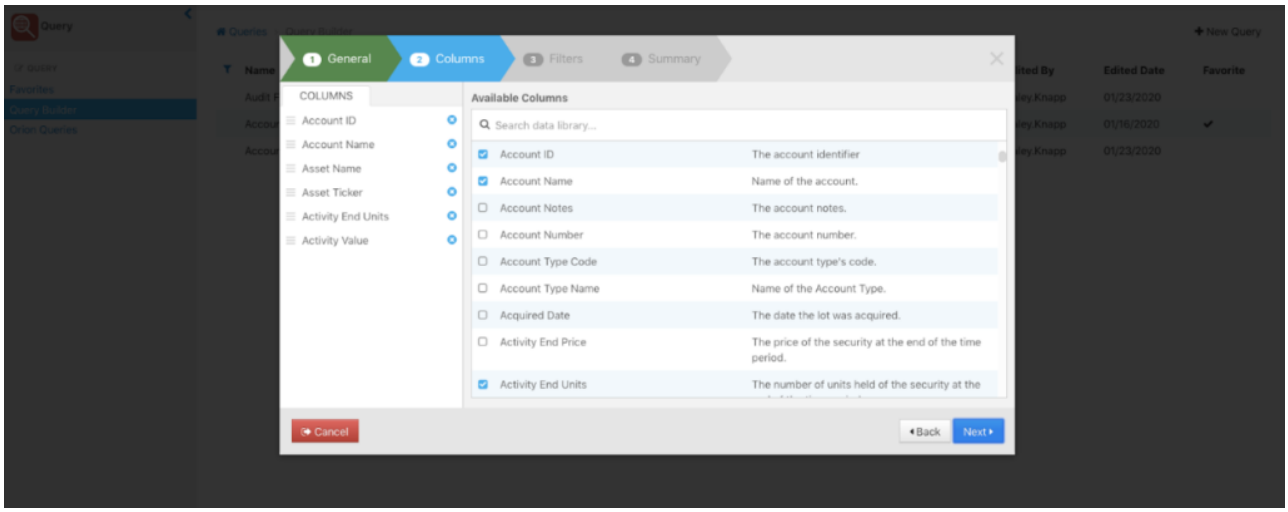
Prompts and filters help narrow down the returned data. “And” logic can be applied to all query conditions; “or” logic allows you to apply one prompt or a combination of prompts. Data filters help you see just the information you covet.



3. You can edit, rearrange, and delete as necessary

Want to add a column to a query? Go right ahead. You can also remove columns with data that's no longer necessary, or rearrange them by dragging and dropping so that your data is presented exactly the way you want to see it.

And if you no longer need a query, simply delete it.



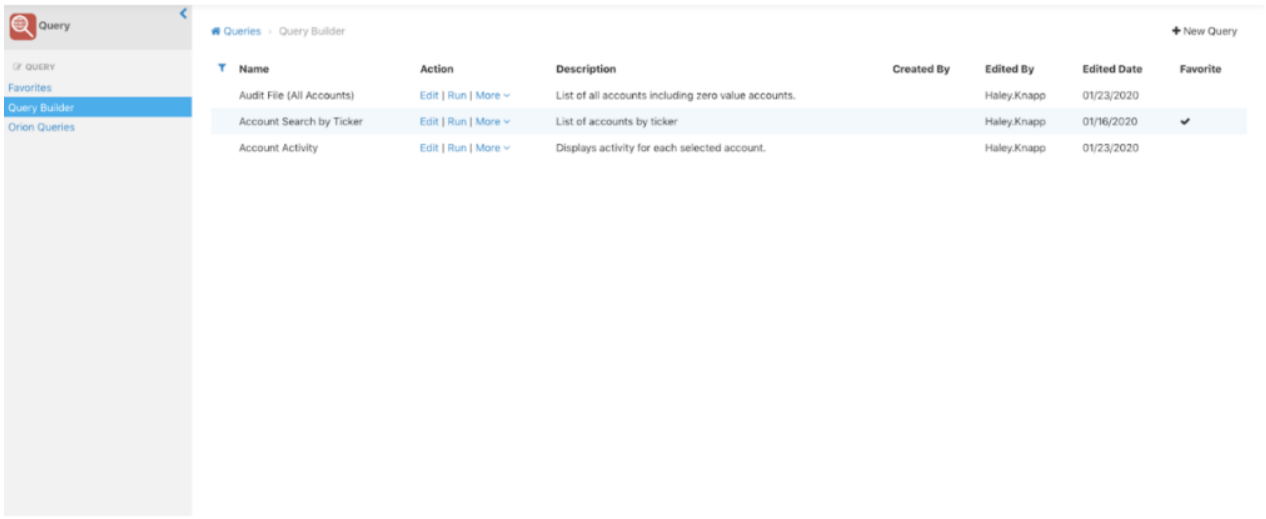
4. You can clone your queries

Some of your queries will be like sisters — similar, but not identical. Save yourself time by cloning one query and making the necessary tweaks to parameters, conditions, name, and description to meet your additional needs.

5. You can find them in no time

There's no point to creating a great query if you can't find it when you need it. Query Builder allows you to name your queries and provide useful descriptions for

each. You can then search for queries by name via the search bar, as well as add your queries to the Favorites tab in the Reporting app.



6. You can share them with your firm

Query Builder encourages collaboration across your business by allowing you to give other permissioned users at your firm access to run, edit, and delete your queries. This eliminates the redundancy of creating multiple copies of the same query.

Take control of the way you access your data with Query Builder. To learn more, join our webinar now.

Not working with Orion yet? Let’s talk about how features like Query Builder can help you run your business the way you want to. Contact us today.

0100-OAS-1/16/2020