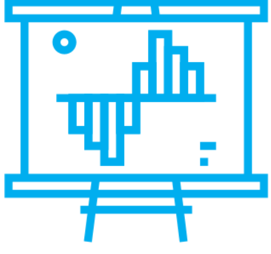
November 2018 Software Update Highlights

On November 10th, the Orion portfolio accounting platform will receive its final software update of the year. Get yourself ready, because we've got a lot of great things to share! In this preview, we'll give you a sneak peek into what you can expect in the upcoming weeks, like….

- Why our next-gen Report Builder will have you dropping everything to create new reports
- Where you can find the support resources you need with the all-new Orion Support app
- How Orion and Schwab have deepened their integration with an expanded Digital Account Opening feature
- What you'll experience with Orion and SaleMove's advanced advisor/client co-browsing tool

Keep your eyes out for another Orion blog when we'll review the full Release Notes and everything not covered in this post!

Reporting



Create Better Reports in Less Time with Report Builder 3.0

What We Built

The updates to the Report Builder app are almost too many to list, but we'll try anyway. For starters, we are consolidating our reporting apps into one centralized location inside of Orion Connect. We're also adding a number of changes to the way you build and interact with reports.

Here's just a few of the most exciting enhancements:

- Drag and drop report sections and format them as half, full, or ⅓ page sections
- Create multi-level pie charts that can stack information in a single chart
- Design your own data tables and then move, add, delete, or adjust columns
- Set default parameters and calculations on tables
- Add images at the beginning, middle, or end of custom reports
- Create a sub-report once, and use it over and over again
- Save multiple versions of a custom report to accommodate unique client preferences
- Get a realistic view of how reports will look before you run them with Live Preview

Why It Matters

The next-gen Report Builder app empowers you to build higher quality reports in less time. Fully preview reports—with demo data—before using them, while also saving multiple versions of a report to accommodate unique client preferences. Build a report once, and then have it available to use time and again at a moment's notice.

How to Learn More

Report Builder 3.0 will enter beta on November 10, with a full release for all Orion advisors coming in early December 2018.

Support

Orion Social Gets New Abilities and an Updated Look and Feel!

What We Built

Right now, you know the Orion Social app as the place to go to find training resources and get support from Orion subject matter experts. In this November release, the Orion Social app will become "Orion Support," with an entirely new look and feel.

In the Orion Support app, we've amplified the app's search functionality so you can now search across all help articles, webinars, Ascent courses, and more without first having to select a specific Group. Additionally, the Orion Support app also includes a Top Apps drawer that gives you new options for displaying your favorite apps, the ability to submit Employee Recognition for when an Orion team member goes above and beyond the call of duty, and security enhancements to new case messages.

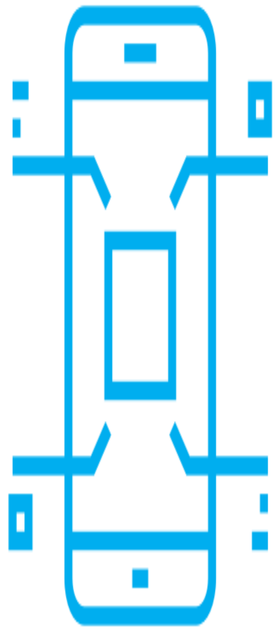
Why It Matters

The Orion Support app will provide you with an easier way to find helpful resources and tech tips by offering the same navigation as the other Orion apps you use.

How to Learn More

Once the November software update is released, Orion Social will automatically update to the Orion Support app.

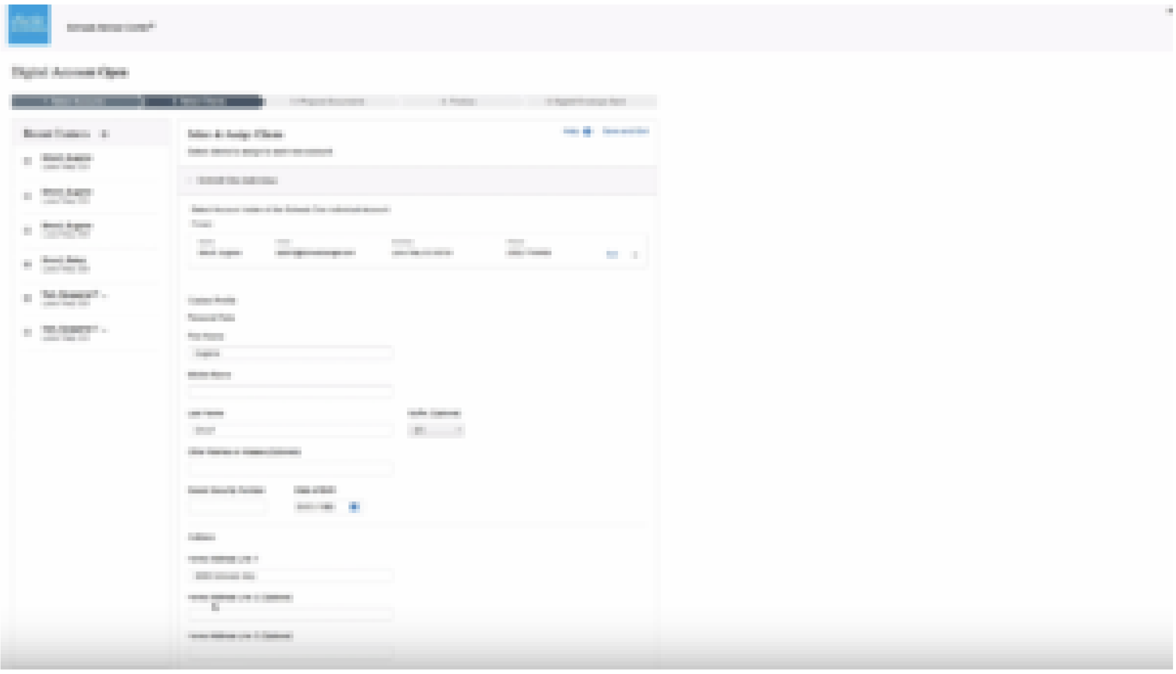
Integrations



Orion and Schwab Team Up to Deliver an Integrated Digital Account Opening Tool

What We Built

Starting from Orion’s New Account Center app, advisors can launch the Schwab Digital Account Opening experience and push relevant Orion data right into their custodial new account forms. The Digital Account Opening tool replaces paper forms with a digital experience for account opening and ancillary transactions, creating efficiency for advisors and their end clients. Meanwhile, clients will be able to review, edit, and approve account applications submitted by their advisors quickly and easily, which will make their accounts ready for funding — sometimes in just seconds.



Why It Matters

Everything—including signature—is handled digitally, and the Schwab account number immediately pushes back into Orion for accurate, instant householding. Further, as the independent advisor industry evolves, more firms understand that integration and digitization provide seamless and time-saving experiences for both advisors and clients.

How to Learn More

The Digital Account Opening tool will enter a closed beta on November 10, with a full release coming early next year.

Orion and SaleMove Empower Advisors to Modernize Client Experience with Co-Browsing Technology

What We Built

Through an integration with Orion Connect, advisors can leverage SaleMove's co-browsing, live observation, and screen share functionalities at no additional cost. Advisors can show clients their account information through Orion's Client Portal and how to take the lead in navigating through their own accounts and reports — all while they share the advisor's screen!

Why It Matters

Adding a digital client-communication platform to your practice modernizes your business. SaleMove’s integrated technology creates a seamless experience that empowers clients to better understand their account positions leading, while enabling clients and advisors to literally and figuratively be on the same page.

How to Learn More

Advisors can turn on the co-browsing tool with the following steps: Manage Users > Roles > Actions > Client CobrowseAll of the highlights covered in today’s article — plus many more enhancements and upgrades — will be coming to you soon!

Click here to sign up for our next product release webinar on **December 4, 2018** to learn more about how to scale and grow your firm with these new

REGISTER NOW

enhancements.

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