

Tech Tip Thursday: How to Link ByAllAccounts and Make Hard-to-Get Data Less Hard to Get



Time flies when you're...well, let's face it: time just seems to fly especially when it comes time to managing a business. That's why at Orion we integrate with partners that fit the way you do business so you can spend more time on what really matters: helping clients and building your business.

In today's Tech Tip, we highlight how to save time and improve efficiency by linking your accounts from ByAllAccounts with your corresponding shell accounts in Orion - and how to do it all without submitting a request for manual processing!

What is it?

ByAllAccounts eliminates the need to manually gather data that is otherwise hard to get such as 401K and 403B accounts; providing you with a unified view of your clients' portfolios. ByAllAccounts utilizes artificial intelligence to gather and transform financial account data into usable data so that you can paint a more complete financial picture for your clients.

Previously, in order to link your Orion accounts with ByAllAccounts, an Orion team member would manually link the two sides to enable communication. But now, what used to be accomplished via an email request to manually combine accounts with the help of Orion's Data Reconciliation Team can now be completed automatically, saving you time and hassle.

Why it Matters...

When you link your accounts with ByAllAccounts, data that was previously difficult to collect and tedious to report on will automatically appear within Orion. You'll reduce the need for manual entry and thereby reduce the room for error associated with manual data entry. Now you can more easily paint a complete financial picture for your clients with less work.

How Do I Link My Accounts?

Ready to save time and make your clients' hard-to-get-data less hard to get? Here's how to easily link your Orion accounts with ByAllAccounts...

First, ensure that you have an existing account within ByAllAccounts.

Next, run the Data Query "ByAllAccounts-Ready to be linked to Orion (Query 9364)" within Orion.

Orion Pro Tip: Column "ByAll ID" in the query results will come in handy in the next few steps. Save this info for later.

A	B	C	D	E	F
ByAll ID	AcctView Account Number	ClientFirstName	ClientLastName	AdvisorFirstName	AccountName
12345	8675309	Chris	Farley	SmeatsServices	Retirement Plan

Then, Open the "New Account Center" App within Orion Connect and create your new account using the "New Account Wizard".

Enter the following information at the Household/Registration Level and click "Next":

- Locate the "ByAll Account ID" field at the Account/Billing level.
- Create your account number - this number may match the number in ByAllAccounts or another number of your choice. Please note that your account number cannot contain more than 50 characters, commas, or an ampersand symbol.
- Once your account is added, it will link with ByAllAccounts automatically and the data can begin downloading!

The functionality covered in Tech Tip Thursday is available and ready to use right now in Orion Connect. **If you want more training about the apps and tools covered in this article**, log into Orion Social to access our full knowledge base, and use the Ascent app for online, on-demand training resources.

Not working with Orion yet? [Click here](#) to get in touch with us.

0530-OAS-10/18/2018