

Tech Tip Thursday: How to Use Orion's Performance Overview App

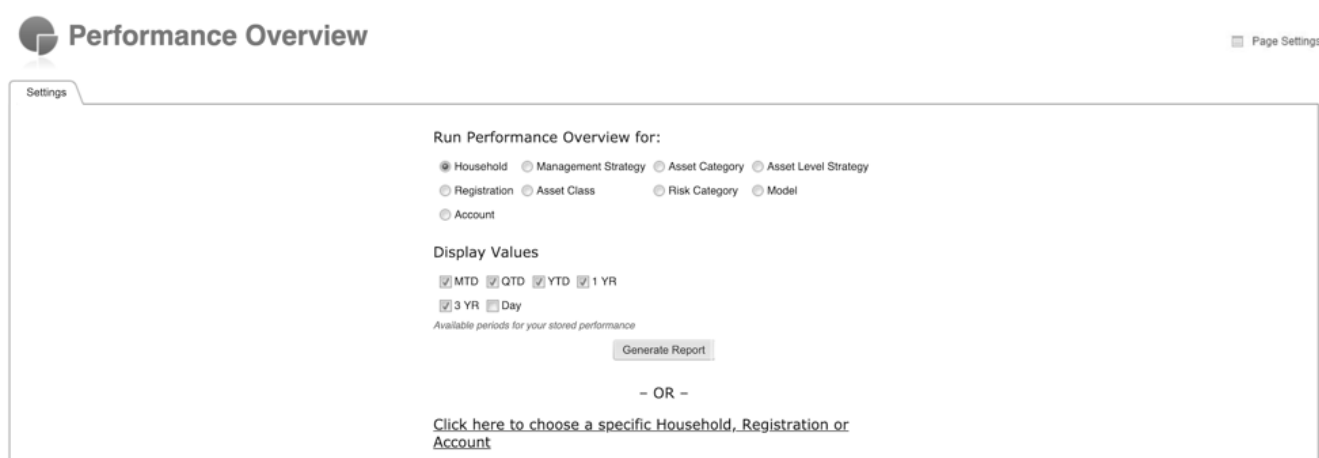
The Orion Connect portfolio management platform does more than give you a single solution for billing, reporting, and trading. It can also be a powerful research tool when you need to understand important information about your clients' portfolios.

In this week's Tech Tip, we're looking at how Orion's Performance Overview app can help you quickly review performance for any timeframe, and for any portfolio level from a single Household to Asset Classes across all portfolios.

What is the Performance Overview app?

The Performance Overview app helps you quickly see the performance of a single entity level, such as a Household or Management Strategy, across your entire database. It displays that performance alongside the performance of any assigned benchmarks.

Orion User Tip: If you're a Salesforce user, Performance Overview loads performance from your database daily and stores that information so it can be synced to your CRM.



The screenshot shows the Orion Performance Overview app interface. At the top left is the Orion logo and the title "Performance Overview". At the top right is a "Page Settings" link. Below the title bar is a "Settings" tab. The main content area is titled "Run Performance Overview for:" and contains several radio button options: "Household" (selected), "Management Strategy", "Asset Category", "Asset Level Strategy", "Registration", "Asset Class", "Risk Category", "Model", and "Account". Below these options is a section titled "Display Values" with checkboxes for "MTD", "QTD", "YTD", "1 YR", "3 YR", and "Day". Below the checkboxes is a small text label "Available periods for your stored performance". To the right of the checkboxes is a "Generate Report" button. Below the button is a separator "- OR -" and a link "Click here to choose a specific Household, Registration or Account".

How Do I Use Performance Overview?

Open the Performance Overview app and select the entity level for which you would like to generate performance.

Next, choose the Display Values (date ranges) for your performance run. The performance date options you can choose from include Orion's usual standard quick dates (MTD, YTD, QTD, etc.) as of the most recent data that was loaded via the "Day" checkbox.

Orion User Tip: You can check Data Query ID 3042 to verify the date of your most recent performance data load.

It's important to note that Performance Overview updates daily, so any changes to transactions or prices that impact performance will not be reflected in the Performance Overview app until the following day when new performance is loaded.

The Performance Overview app is your go-to solution for the next time you need to review detailed performance information. Give a try today!

If you have additional questions about what was covered in this article, please log into Orion Support and start up a chat with our Billing SME Team.

Not an Orion client yet? Get in touch with us [here](#) to schedule a demo.

0690-OAS-12/26/2018