



Tech Tip Tuesday: Billing Lockdown

Today's Tech Tip Tuesday post answers one of our most frequently asked quarter-end questions: how do I take my database out of billing lockdown once I am finished running my bills?

Let's dive in and see how you can quickly unlock your database and help simplify quarter-end:

What is it and Why is it Helpful?

Quarter-end often means multiple people working together to get the job done. In order to prevent one person in the office from editing billing settings while you're running bills, Orion's best practice is to enable "Billing Lockdown" so others cannot unintentionally affect your billing process.

Billing Lockdown allows users to disable the ability to edit or update common billing items such as fee schedules, cash flows, asset exclusions and householding.

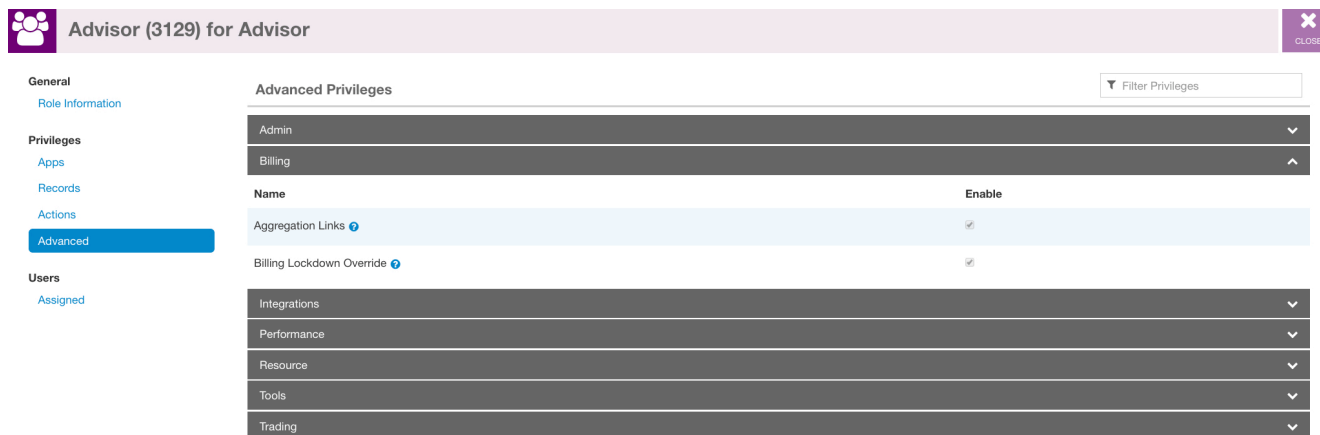
Once your billing is complete, you can choose to turn billing lockdown off so that edits can be made without complicating your quarter-end billing.

How Do I Remove Billing Lockdown?

First, check your rights to ensure you have the ability to turn off Billing Lockdown. To check your permissions, go to the Manage Users App and highlight the "Advisors" tab.

Next, right-click on your name and select “Edit User” then select the “Profiles” tab on the left and click on the blue “View” button to the right side. Under “Advanced”, select the “Billing” section and check “enable” next to “Billing Lockdown Override”.

Then save and refresh your browser!



To remove the lockdown, simply open the Bill Generator App and select the “Bill Instance” tab. Highlight “Actions” in the top right corner of your screen and then select “Lockdown Maintenance”. Next, you’ll be asked “This database is currently in lockdown. Do you want to remove the lockdown?” Hit “OK” to disable it.

Your database is now unlocked!



Did you Know...

Your database will automatically disable Billing Lockdown when you’re finished with a live bill, as long as all of your prior Bill Instances are in a “Complete” status.

To check the status of your Bill Instances go to the Bill Generator App, select the “Bill Instance” then highlight the “Status” column.

If older bills are in any other status type, you can Complete them by double-clicking the Bill Instance to open it, select “Actions” and then “Force Complete”. You can also right-click the instance and select “Delete Bill Instance” if you no longer need this particular bill, such as an old Forecast bill.

The screenshot shows the Orion Connect Bill Generator interface. At the top, there is a navigation bar with a home icon, the text 'Home > Bill Instances', and a blue button that says 'Click HERE for a Bill Generator Guide'. On the right side of the navigation bar is an 'Actions' dropdown menu. Below the navigation bar is a table with the following columns: ID, Name, Status, Run For, Bill Type, Forecast Bill, Households, Period Start, and Market Value. The table contains four rows of data:

ID	Name	Status	Run For	Bill Type	Forecast Bill	Households	Period Start	Market Value
2015	Recalculated inv...	Complete	Single Household...	Renewal		7	2016-12-08	\$8,671,996.75
2014	Fee File Needed ...	Fee File Needed ...	All Households	Renewal		93	2016-12-08	\$8,671,996.75
2008	TEST	Complete	Single Household...	Renewal		1	2018-10-01	\$726,542.56
2006	Forecast Test	Complete	All Households	Financial Pla...	✓	12	2018-07-01	\$12.00

Expert Advice: We don’t suggest deleting a live bill if that bill represents a fee that you collected from the account held at a custodian.

The functionality covered in Tech Tip Tuesday 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.](#)

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