# Tech Tip Tuesday: How to Correct Account Numbers and Get Help Faster

Today's Tech Tip Tuesday is a two-for-one. After reading today's post, you'll have all the information you need to find helpful articles faster, and take care of certain account maintenance updates yourself.

Let's dive in!

## Tech Tip 1: Correcting an Incorrect or Missing Account Number

When creating a new account, an incorrect account number may sometimes be inadvertently entered. Other times, an account number may not be added at all, if the account record is created in Orion before the custodian assigns a number.

In order for data to sync correctly from your daily feeds, it's critical for the account number to be corrected. Anyone that has "Role Privilege" can make edit accounts can make an account number change.

### How To Access This Feature

### Once an account has been created:

1. Navigate to the **Portfolio Audit** app and go to the **Accounts** level to locate the account you need to correct.
2. Once the account is located, simply right click on the account and then click **Assets**.
3. No assets will show, as no assets have been added to the account as of

yet.

4. At this point, click on the **Actions** dropdown menu and select **New Asset**. This will bring up a new window shown below:

5. In this screen, an asset will need to be added. In our example we select an asset called **Performance**, enter **Normal Downloading** for the Status, and then **enter the correct account number** on the right of the screen. Then click **Save**.

 Now the account number has been updated!

**Note:** Account numbers *cannot* be changed by simply selecting "Edit Account" within the Portfolio Audit App. The steps outlined in this article are the only correct method.

# Tech Tip 2: Quick Search for Orion Help Articles

We released an enhancement to the main search box in Orion Connect that lets you search for any help articles posted in the Group pages in Orion Social. With these new steps, you can save time when looking up articles—you no longer need to leave Orion Connect to access training material!

## How To Access This Feature

1. Click on the **Settings** dropdown to the right of the search box in Orion Connect and ensure "Help Articles" is selected.

2. Next, search for your training topic! The results will be categorized as "Help:"

3. The article will open in a new window after you select it. Additional related articles will appear on the right side of the screen.

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.