Orion Connect App List - New vs Legacy Icons

Overview

The Orion Connect App icons have recently been updated! This article separates the app icons by SME area, and lists the new icons in comparison to the legacy icons for easy reference. A description, and potential user level access, is also provided for each app.

Access Legend
Orion
Advisor
Representative

Billing

New Icon | Legacy Icon

Billing Audit O A R
Audit and update billing-related information for new and existing clients all in the same place! Use this app to improve Monthly/Quarter End processing times by ensuring your billing data is accurate.

Bill Generator O A
Take control of your advisory fee billing process! This app provides a way to generate quarterly, monthly and one-off bills for your clients + the ability to run mock bills prior to your live bill!

Post Payments O A
Track your receivables by posting payments as you collect your advisory fees. This will make it easy to determine which fees have been paid, and which fees are considered outstanding.

Payout Dashboard O A R
Assists with tracking fees that have been paid to determine how much to payout to all of your entities. This app also allows you to run Advisory Fee Reports that provide a breakdown of payout amounts for each entity as well.

Compliance

New Icon | Legacy Icon

Compliance O A
Gather the information needed to survive an audit all in the same place. A one stop shop to organizing your Audits, Queries and ADV!

Inform O A R
Monitor your employee's personal trade activity, send out Quarterly Transactions Questionnaires, or Annual Compliance Questionnaires, track employee's Outside Business Activities, Gifts and Entertainment or other Tasks.

Cost Basis

New Icon | Legacy Icon

Tax Center O A R
Review and manage data associated with your Custodial Cost Basis or your Cost Basis Overrides. Identify potential data gaps and ensure information is up-to-date so Gain/Loss Reports are accurate!

Corporate Actions O
Available only for Orion Internal Users. This app allows Orion to efficiently process and audit corporate actions as needed.

Data Recon

New Icon Legacy Icon

Account Composer O A
Create, manage and maintain alternative investments through Orion Alternative Investment Platform (AIP). Easily manage and review heldaway assets and accounts.

Reconciliation Status O A
Review the status and details for each Download Interface. Notes may be posted by your Orion Accounting Analyst related to File Delays or if Reporting and/or Trading should be avoided. It's your window into Orion's Data World!

Confirmation Overview O
Available only for Orion Internal Users. This app allows Orion to efficiently process and reconcile custodial data and files related to portfolio information.

Financial Planning

New Icon Legacy Icon

Orion Planning (Previously Advizr) **O A R**
Offer clients a single easy-to-use portal to access investment performance, financial planning, data aggregation, and document storage. The Orion Planning app is completely customizable to fit each client's unique situation. *For questions on features or data points that do not relate to Financial Planning, please reach out to the corresponding SME team for support; Client Portal - Platform Support, Performance - SME Performance, Transaction and Data Information - SME Data Recon, etc.

Integrations

New Icon Legacy Icon

Integrations Center O A
The centralized resource for all things integration. Search for partners based on type or integration point, add new integrations, and find out about new and updated integration partners.

Onboarding

New Icon Legacy Icon

Onboarding O A
Track your firm's progress through the Onboarding phase! This app a visual Gantt chart, breaking down each step of the Onboarding process, providing a timeline that is updated in real-time while you are working with the SME Teams!

Performance

New Icon Legacy Icon

Benchmark Assignments O A R
Maintain benchmark assignments across multiple levels; Database, Representative, Household, Registration, Account, Management Style, Model, Asset Category, Asset Class and Risk Category

Blended Benchmarks O A R
Create and manage blended benchmarks. Once created, these benchmarks will appear in the Benchmark Assignments app. Add Change History to accurately represent historical weightings.

Composites O A
Create and review monthly account performance lists to be used for Composite Reporting. Filter for specific criteria, review strategy assignments and exclude accounts before running Composite Reports.

Performance Overview O A R
Audit or review stored performance (across your database) for multiple groupings or select a Household, Registration or Account for a detailed performance analysis.

Performance Viewer O A R
What's in a number? Analyze performance using multiple grouping methods, identify when Advisory Fees affect performance and research individual Asset performance to identify positive or negative effects on an account + more!

Batch Performance O A
You now have a powerful tool at your fingertips to run your own Performance Batches, customized to the needs of your firm. Choose your entity level, select groupings, and even change some of your default performance options.

Platform Support

New Icon Legacy Icon

Firm Profile O A R
Review and manage all Firm-level entities. Create and maintain the following items:
Billing (Fee & Payout Schedules), Portfolio Details (Custodians, Management Styles, Business Lines, etc.), Registration Types and Relationships (Broker/Dealer, Representatives and Sub-Advisors, etc.)

Manage Users O A R
Create User Logins for Advisor, Representative and Client level users. Maintain Roles and Privileges within each Role. Create users en masse and customize email templates that are sent to Users when creating and resetting.

Secure Exchange O A R
Securely send email content and files between multiple user levels, including any Third Party users not affiliated with Orion or your firm. Attached files are removed after 15 days for added security.

New Icon Legacy Icon

Portfolio Audit O A R

Manage portfolio data across all levels (Households, Registrations, Accounts, Assets, and Transactions). Update a specific list or choose to update across Multiple Lists. Organize portfolios using the Householding or Cancel Accounts tool. Quickly access the Household Overview or Reporting app.

New Accounts Center O A R

Review and update information on all new accounts based on created date. Assign a Status and Track accounts with custom views. Add Accounts manually or import from a template before they download.

Householding O A R

Easily identify and organize accounts (as needed) between Registrations and Households i.e. Husband and Wife accounts are under different Household IDs. Use this app to consolidate under the same ID.

Client Experience O A

Control the newsfeed posts and content that appears in the new Orion Client Portal through the Client Experience app. It also lets you update and maintain the legacy client portal settings, and allows you to view the client portal tasks that are sent to you from your clients in the legacy client portal.

Client Portal O A R

Experience what a Client Level User sees when they log into the Orion platform. Invite new clients, manage Admin Settings or add additional Content and Commentary (based on User Level Rights).

Custom Imports O A

Update various levels of database and portfolio data en-masse. Populate a template, upload and track import history. View and Undo past imports as needed.

Support O A

Provides users with the opportunity to directly access online learning tutorials such as webinars and help articles. Instantaneously connect with Orion Subject Matter Experts through the email, phone or chat feature. In addition, the platform allows Advisors to receive a comprehensive status update of all open support cases.

Ascent O A R

Start your Orion Learning Adventure! Ascent provides online training and assessments to ensure that you're making the most of your Orion experience.

Notifications O A R

Manage your Client SMS Settings. Choose which text features to include, along with custom verbiage and other firm-specific disclosures!

Orion Mobile App O A R

The Orion Mobile App is a custom app for iPhone and Android devices. It allows you to take the power of the Client Portal and put it into your clients' hands so you can go with them, wherever they go.

Products and Prices

New Icon Legacy Icon

Products and Prices O A
Review and maintain Product Classifications like Asset Category, Asset Class, Risk Category. Search your Local Products or Orion's Global Products List + review local and global Prices. Use Product Audits to keep your product assignments in shape for Trading and looking good on Reports.

Reporting

New Icon Legacy Icon

Reporting O A R
The Reporting app contains Reports, Report Inbox, Report Batches, Report Builder, and Deliver. Access Custom and Standard reports, process batch reports, run reports to the inbox to review later for up to 5 days for compliance, create and send email templates to specific mail groups, and create custom reports using various elements, themes, report versions, and manage user access.

Query O A R
Select from pre-built queries and create a customized list. Select a query and choose an output method; Run to Screen, Export to Excel or CSV. Send to Report Inbox or download directly to your browser.

Video Statements O A R
Upload a video and add custom data layers throughout the video. Post videos to the Client Portal app and notify clients using the Deliver app that a new Video Statement is available!

Quarter End Dashboard O A R
Create and manage a Monthly or Quarter End workflow. Task and Action items can be customized to fit a firm's business needs. Provides auditing and review of database-specific settings and options.

Insight O A R
Assemble dashboards with ease. This app provides all sorts of sweet widgets to help review and analyze client portfolio data. Bring your portfolios to life with Insight.

Trends O A R
Provides a Business Intelligence Dashboard with access to month-over-month data analysis. Find trends with historical data points or slice n'dice using multiple attributes all within a beautiful dashboard!

RMD Dashboard O A R
Review specific information related to Required Minimum Distribution needs. Access Forms and generate Mail Merge letters. Update related RMD information stored on the Registration (Date of Death) and Account (Systematics) lists directly from the app.

Grouping Manager O A R
Create custom Groups (Views) to be used for Reporting and Trading. Assign as Private or Global and make specific groups for Reporting or Trading as needed.

Trading

New Icon   Legacy Icon

Astro O A R
Empowering Advisors to build custom tax-efficient SMA portfolios by replicating an Index, transitioning clients to their strategies and/or managing around legacy positions while also taking ESG constraints into consideration and much much more.

Astro Light O A R
A client facing tool that allows Advisors to show clients and prospects how the can make their portfolios track close to a target while becoming more tax-efficient with before and after analysis reporting.

Eclipse O A R
A fully customizable trading and rebalancing platform. Eclipse empowers you to trade at the household level with asset location optimization to create the most tax efficient trades. With a robust set of features -- including tax loss harvesting, multi-level modeling, unlimited cash buckets, interactive dashboards, and custom trading preferences, cater to any client's unique needs while enhancing your firm's trading processes.

Models O A R
Create new models and update existing model allocations and weightings. Manage account assignments under each model or launch the rebalance wizard.

Sleeves Strategy O A R
Review and maintain your Trading Sleeves! Update information, review Sleeve History, and Registration Assignments

Trade Order Management O A R
Use the TOM app for all your trading needs! Includes order management, portfolio trade tools, and model maintenance. Create Custom filters, views, and groups. Access custom trade analysis tools.

Trade Queue O A
A Sleeve Trading Dashboard! Monitor and audit triggered trades, aging cash balances, trade execution logs and more.