



From the President

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Are We There Yet?

With the Midwest sun thickening the summer heat, so are our operations and development implications. Anticipation has been peaked and now it is the month of August, Advisor Desktop 5.0 build to be released. Most of you have been busy training to fully capitalize on our new navigation system, our encrypted User ID and Passwords to enable single-sign access to a variety of platforms and our newly implemented "Orion Wall" newsfeed. We at Orion are very excited to showcase our new navigation and web enhancements.

In addition to our *Advisor Desktop* release, Orion will be launching a new self-service portal for our advisors. Our Advisor Commitment is highly important, especially bullet two reading, "We are available, prompt, honest and totally accountable."

Lastly, we have our annual conference coming up in Orlando from September 15 to 17. It is going to be the largest one yet and we are looking forward to the success it brings us all.

Please enjoy this month's issue of The Efficient Advisor!

Eric Clarke, President

Si Sales Ideas

By Bill Wostoupal
National Sales Manager

Too often, financial advisors forget the significance of delivering presentation materials to their clients. In his blog (www.kanecarlton.com/blog), financial blogger Tom Kane of KaneCarlton discusses the "Power of Process" regarding the importance of creating and providing these professional presentations and reports. At Orion, we strive to put valuable information in a professional-looking report in your hands and in the hands of your clients.

See *Sales Ideas*, continue on Page 2.

BBVA

Jacksonville, FL

Holcombe Financial

Sandy Springs, GA

Renown Wealth Advisors, LLC

Temple, TX

Orion

Welcomes our new Advisors

Sales Ideas, continued from Page 1.

Not only do these reports give your client a clear financial picture, but they extend the branding of your firm. With the focus that has been placed on improved reporting for the August Orion Desktop release, I thought this article was a timely reminder for all of us (Orion employees included) about the importance of having polished reports. We look forward to having Tom as our featured presenter in the next installment of our monthly Practice Management webinar series on **September 21 at 3:15 PM Central Time.**

The Power of Process: Presentations & Reports

By Tom Kane

Wealth Biz Buzz Blog, Kane Carlton.com/blog

As we talk about managing the client experience I think it is important to take a few moments to reflect upon what clients really experienced during the market meltdown. Sometimes we are so close to this stuff that we lose sight of what these dollars and cents really represent to our clients.

The losses they incurred affected their security, changed their life styles and dashed their dreams. And, while that might sound overly dramatic, particularly in light of a rebounding market, think back two years as the swirl of unbelievable news and events unfolded. I know plenty of advisors who had to tell clients to reduce retirement distributions, take on part time work, work longer or take a loan to pay those college bills.

We need to do whatever we can to restore our clients' trust in this post Madoff world. They are still in shock over how the wheels came off of what seemed to be a well thought out, diversified strategy. But, those uncorrelated assets correlated and, we all know the rest...

The fact that we are in the business of selling intangibles exponentially intensifies the impact of that such dramatic events had on our client's psyches. We are not selling cars with 100,000-mile warranties or ties or shoes; things that consumers can touch and use.

In my early days we gave our clients stock certificates or bonds representing their investments, but that tangible proof dissolved years ago, only to be replaced by a statement saying that Al Stanford and Bernie Madoff are making you a ton of dough, – all is well – don't worry.

Those of you that know me might think that I am on

some tangential rant that has drifted from the topic at hand, the Power of Process, however, I say nay, nay, retorting that if we are truly going to manage the client experience, we need to look at what they experienced from their perspective.

Keeping that in mind, we can successfully move toward creating certainty amid the chaos created by forces and conditions that few of us fully understand.

While we can't control these forces, what we can control is our reaction to them on our clients' behalf.

As we talk about the importance of the Discovery Process and becoming more personally invested in who our clients are, it lifts us beyond their financial vital statistics.

We now can fully understand the importance presentations and reports play in helping create certainty for our clients in a business inundated with conversations surrounding volatility.

The documents you give your clients are your suit of clothes. They are the most tangible representation of what you will do and are doing for your clients. It's where you "put it in writing".

My wife, who happens to be a successful independent financial advisor, came home recently with a brighter than normal Cheshire cat smile. In conversation, I discovered she just established a new client relationship with an investor who had entrusted her with his \$900,000 nest egg. As our talk progressed, she produced two presentations that the client had given her from competitors.

One looked like a homework-eating dog collided with a broken-down inkjet printer. The other presentation was the omnipresent yellow legal page with some scribbled recommendations stapled to series of printouts emblazoned with "For Broker-Dealer Use Only".

Mind you, her competitors were not some mom and pop, single shingle shops, they were national brands.

In fact, I happen to know that each of these firms has very sophisticated presentation tools available to their advisors. After looking at what was given to this gentleman, it made me wonder if these advisors had rolled out of bed that morning, skipped the shower and shave, slipped on a pair of cut-offs, flip flops and a dirty tee shirt, and went to the office to meet with a wealthy prospect?

Three key tools that can help you achieve this are the [See Sales Ideas, continue on Page 3.](#)

The documents you give your clients are your suit of clothes. They are the most tangible representation of what you will do and are doing for your clients.

Sales Ideas, continued from Page 2.

Investment Policy Statement, the Service Level Agreement and sophisticated client reports. Those documents and reports we give our clients are the most tangible representation of who we are and what that they will receive. With these documents we have the opportunity to create certainty by demonstrating knowledge, understanding and wisdom.

www.kanecarlton.com/blog

ABOUT TOM KANE

Tom has dedicated over 30 years to providing sound advice and personal, caring service to the wealth management industry. From helping investors realize their dreams to leading institutions toward optimizing performance in the delivery of wealth management solutions, Tom has played a part in transforming the industry and his clients' lives.

He frequently appears in the financial press providing insight into the latest trends and opportunities, while keeping a keen eye on the enduring traditions that have enabled the industry to help generations of clients reach their goals.

He is a frequent industry speaker engaging audiences with ways to consistently manage and enhance the client experience. He is married to a successful independent financial advisor with over 27 years of experience.

ABOUT KANE CARLTON

Kane Carlton is in the decision business. They help their wealth management clients make informed decisions by providing them with research, competitive intelligence, best practices and innovative, objective solutions for reducing costs, increasing revenue and staying competitive.

Unlike pure consulting they pride themselves on being on the field and in the game with you, focusing on implementing the work product they create.

To learn more about Tom and KaneCarlton, visit their website at kanecarlton.com, call 703-690-9985 or email tom@kanecarlton.com *

"Wealth Biz Buzz"
www.kanecarlton.com/blog

Advisor Desktop 5.0 Installation Instructions

Technology Tips

By Joe Leyboldt
Director of Technology Support

Orion will be rolling out our *Advisor Desktop* 5.0 on Saturday, August 21, 2010 to entail a re-design of the application's navigation, as well as new enhancements to the application.

How do get the new features? If you're on *Advisor Desktop* over CITRIX, you will have to do absolutely nothing. Orion will update *Advisor Desktop* on CITRIX for you on **Monday, August 23rd**, and it will automatically be ready to go.

What if I'm not on *Advisor Desktop* over CITRIX?

Option 1 -

Contact your account manager, here at Orion, so they can talk to you about the benefits of CITRIX and assist you on converting you over immediately.

Option 2 -

You will need to follow the instructions below to update *Advisor Desktop* on your machine manually:

1. Go to www.advisorlynx.com/iminstaller.aspx
2. Login using your Orion *Advisor Desktop* credentials
3. Click on the *Advisor Desktop* 5.0 link, then click the Save button
4. When the download is complete, double-click on the file you just downloaded (*AdvisorDesktop.zip*)
5. Extract the three files to your desktop or another location
6. Double-click on the *Setup.exe* file to ensure you receive the new Microsoft.Net & Report Viewer components as well as the new version of *Desktop*

**There is no need to uninstall your old version of Advisor Desktop. By following the above instructions your old version of Advisor Desktop will be uninstalled automatically and the new version will be installed.*

INSIDER: Advisor Products Launching A *NEW* Offering

Advisor Products, a key integration partner of Orion's, has launched a new offering called Quarterly Market Summary, which makes it much easier to write a letter to accompany your quarterly client reports.

Instead of writing your quarterly letter to clients from scratch, Advisor Products offers statistics and analysis summarizing performance of stocks, bonds, industries, interest rates, foreign markets, GDP, inflation, employment, currencies, and other key data.

The Quarterly Market Summary provides advisors with help writing about what's happening in the markets, making quarterly portfolio reporting easier. Most of the content you need to write to accompany your performance reports is comprised of facts about the economy and markets. Quarterly Market Summary provides those facts, along with important perspective to help clients understand portfolio performance. You can personalize Quarterly Market Summary as necessary, as there is no substitute for your own words in explaining portfolio performance to your clients.

Advisor Products is offering Orion's advisors a free trial of this new offering.

And here's what's most exciting, in Orion's November production release, **Quarterly Market Summary** will be integrated into the **Orion Report Builder** tool! You'll be able to choose which sections of QMS you wish to embed into your client reports from Orion Report Builder and edit any of the text on screen. You'll need to subscribe to QMS to take advantage of this integration.

We're excited about this partnership and thank Advisor Products for providing a free trial to Orion clients.

To learn more, please go to
<http://www.advisorproducts.com/quarterly-market-summary-download.aspx>

Tr Training Calendar

Pre-Production Release: Advisor Desktop Navigation

Tuesday, August 17th at 11:00 am CDT

Thursday, August 19th at 3 pm CDT

New Navigation & Features in Advisor Desktop

Tuesday, August 24th at 11:00 am CDT

Website Enhancements

Wednesday, August 25th at 11:00 am CDT

New & Updated Reports

Thursday, August 26th at 11:00 am CDT

For recordings of all our training sessions, log into your account and choose **RESOURCES** Tab > **COMMUNICATIONS** > **TRAINING**.

Ev Events



Orion's 2010 Advisor Forum
 September 15 - 17, 2010 in Orlando, FL

Contact your account manager to attend
www.orionadvisor.com/advisorforum

Orion's Service Holds Accountability

Operations Insight

By Randy Lambert
Chief Operations Officer

Orion is Available, Prompt, Honest, and Totally Accountable. Sound familiar? That is our second bullet point of the **Orion Advisor Commitment**. These words don't mean anything unless Orion is able to execute.

How does Orion hold itself accountable to Advisors? I'm excited to announce a new era in Orion's accountability to advisors. By the end of September, Orion will launch a new self-service portal for our advisors. We believe this portal will transform the way advisors work with Orion. Functionality will include the ability to launch cases directly from Orion's website. But more importantly, our advisors will be able to track the progress of a given case from open to close - with real time updating.

Orion tracks all emails and phone calls that come to our service teams from advisors. Each correspondence creates a case in Orion's internal CRM. In turn, these cases will also be synched up and available to the advisor through the self-service portal. All cases will be in one central location with filters and sorts to accommodate the most efficient method for an advisor. For example, an advisor will have the option to create a view for any case that they have personally submitted or can look at the entire office library and/or sort by the view by date, type or user. This service transparency brings a new level of communication and accountability to the benefit of our advisors.

How can Orion be more prompt and available to Advisors? The self-service portal is not just about tracking issues submitted by our advisors. Orion is also creating a knowledge base that will allow advisors to search for their own solutions, without having to take the time to send an email or make a phone call - **keeping our advisors efficient**.

Orion's knowledge has a large content baseline that can help explain topics, such as cost basis, performance, trading or integrations. Our search functionality will include the ability to type in certain topics or key terms. Once a list of topics are pulled from the knowledge library, advisors can sort the list by key data (date, category or number of views). Orion will continually update the knowledge library


and make new topics available.

How does an advisor measure how Orion is doing? Next month in your September Business Metrics Report, you will see a new sub-report called Service Metrics. This report will highlight how Orion measures its own service internally measuring five key pieces of data:

- Total Cases: the total number of correspondence your firm has had with Orion
- Percent of Cases in Service Goal: Orion has a goal of responding to your case within two hours of receipt 95% of the time
- Average Case Handle Time: the amount of time it takes Orion from the opening to closing of a specific case
- Average Call Ring Time: the amount of time it took on average for Orion to answer your calls
- Average Call Handle Time: the amount of time to take care of the advisor's call once it was answered

Orion believes by revealing this information to our advisors, it will hold us accountable as well as encourage the desired behavior to provide the best service possible.

We are excited about the new tools and information we are making available to our advisors. We believe this transparency will strengthen our relationship with our advisors.

If you have any feedback for me, please contact me directly at randyl@orionadvisor.com. I enjoy hearing your perspective. 

Events

ORION'S PRACTICE MANAGEMENT WEBINAR SERIES

Join us with Orion's parent company, NorthStar Financial Services Group, LLC, for our monthly best practice webinars.

Tuesday, August 17th at 3:15 (CDT) featuring David Grau of FP Transitions on **"Assessing the Worth of Your Financial Practice"**

Tuesday, September 21st at 3:15 (CDT) featuring Tom Kane of Kane Carlton

Learn more & watch full replays by following our blog at www.orionadvisor.com/blog 



Advisor Desktop

Version 5.0 AUGUST RELEASE - The following items are expected to be available in August 2010:

- I) Report Updates (New Reports and Updates to Existing Reports)
- II) Navigation Update of Advisor Desktop
- III) Commission Tracking
- IV) Orion's Wall
- V) Cost Basis Method Assignment
- VI) New Dividend Rate Import
- VII) Enhanced Web Pages
- VIII) Secure Documents

I) Report Updates

Annualized vs. Non-Annualized Performance Numbers

On reports that display performance numbers, an option will be added to annualize or not annualize the returns. If the returns are annualized, a note that says "returns are annualized for periods greater than one year" will appear on the report.

Beginning Market Value

Currently when a report uses the inception date as the start date, the report displays a zero for the beginning market value, and the invested value appears in the contributions section.

After the August build, the beginning market value will be changed to display the end of day market value on the inception date of the portfolio.

Fixed Income Reports – Product Type Selection

For the fixed income reports, an option will be added that allows the user to select which product types to include in the report. These options include mutual fund, annuity, stock/ETF, option, bond and CD.

Disclaimer

The fixed income reports currently do not have an option to include a disclaimer like the other standard client level reports. The disclaimers option will be made available to the fixed income reports as well.

Portfolio Valuation – Activity Summary

If fewer than five periods are selected for the activity summary section of the performance evaluation report, the columns will be more evenly spaced to create a more aesthetically appealing report.

Estimated Income Report

The estimated income report currently uses the previous 12 months of distribution rate information to estimate the income for the following 12 months. An alternative option will be added to the report to apply the most recent distribution rate to estimate the income for the next 12 months.

Payables Summary Report

The Broker/Dealer name will be added to the payables summary report. It will appear to the right of the representative number that currently appears on the report.

Accrued Interest

An option to display accrued interest and corresponding account value totals (including accrued interest), will be added to the values displayed on the **following reports**: Portfolio Position report, Portfolio Valuation report (Portfolio Valuation and Portfolio Detail sections), Estimated Income report, Firm-Wide Composite report, Performance report (Performance Summary section), Performance by Asset Class, Benchmark Comparison (Asset Detail section), Business Metrics report (AUM section), Assets Under Management report, Assets Under Management by Client Report, Rep Asset Information for Fund by Asset Class Report, Gain/Loss report (Unrealized), and the AUM By Management Style and AUM by Month summaries in *Advisor Desktop*.

Relative Index Performance (Sub-report)

This sub-report will display the performance for all of the management strategies within a household side -by-side with the performance of the index assigned to the management strategy.

The sub-report will also contain a weighted average for the management strategy performance and the index performance.

Bond Ratings

Currently, the system allows only one bond rating to be assigned to bond products. Orion will add a second rating field so advisors may track ratings from two different services.

Bond ratings will be able to be assigned in *Advisor Desktop* under **Maintain > Products**, then choosing either **Product Search** or **View Product List**.

See [Advisor Desktop on Page 7](#).

Advisor Desktop, continued from Page 6.

Performance Report

A new option called **show full asset history** is being added to this report. This option will allow the user to show all assets within a household, regardless of value. Currently, this report only shows assets that have a value at the beginning or end of the period chosen.

Another new option will remove the default grouping (by registration). This will show performance across the entire household by any of the other groupings chosen (asset class, risk category, account, management style).

The option currently titled **show detail** will be renamed to **show asset detail**. This option displays the names and market values for the assets included within an asset group.

A new **show asset performance** option will include the individual asset performance for each of the assets included within an asset group. The option to group by asset will be removed. To group by asset, select **show asset performance** as described above.

Accounts in this Report (Sub-report)

The accounts in this report sub-report within Report Builder will be given the ability to change the header of **management strategy** and **model name** to a title of your choosing.

Performance by Asset Class Report

The **Performance by Asset Class report** will be given a new option for grouping the results by risk category. There will also be a new column added to show the **non-annualized performance** as well as the **annualized performance** that is currently displayed. Presently, this report runs for all clients within the database.

New sections on the Business Metrics Report - Performance vs. Benchmark

The **performance vs. benchmark** area of the **business metrics report** will show how many total accounts are assigned to a specific benchmark over varying periods and will show how many accounts performed better than the benchmark, and how many were outperformed by the benchmark.

These results will also be represented by a pie chart. It will also group the accounts by the difference between the account performance and benchmark performance, >5%, +5% to +2%, +2% to +1%, +1% to 0%, 0% to -1%, -1% to -2%, -2% to -5%, < -5%.

This sub-report will also be available in the performance supervision analyzer in the composite section of *Advisor Desktop*.

Financial Ratio Metrics

The financial ratio metrics area of the **business metrics report** will allow the overlay of financial metrics with your firm's business metrics. For this section to display, the advisor will need to input a few pieces of the advisory firm's financial information.

In turn, the report will analyze this data, provide results for financial ratios and track and report over a series of quarters. The data will be returned in pie chart and bar graph formats.

Orion Utilization

This report will show which areas of the *Orion Advisor Desktop* application are being used and how often they are being used. Results will include details such as: number of trade instances created, number of advisory fees calculated, number of custom reports created, and number of custom reports available on the web site.

The report will also include integrations that are available and whether the integration is currently in use. These items will include the use of CRM, new account tracking, account aggregation technology for non-downloaded accounts, web services, etc.

Service Metrics

The service metrics section of the business metrics report will display the performance of the Orion service team as it relates specifically to your firm.

This report will show total number of cases created, number of service cases responded to within the service goal, average case completion time in days, average call ring time (number of seconds before the call is answered) and average call completion time in minutes and seconds.

See Advisor Desktop on Page 8.



Please contact your account manager to schedule your July and August training demos for the *Advisor Desktop August Release*.

Register now for the next training sessions at www.orionadvisor.com/events



Advisor Desktop, continued from Page 7.

Group the Business Metrics Report By Representative

An option will be added that will allow the entire business report to be run at the representative level. Reports run at the representative level will only include metrics that can be attributed to a specific representative.

Advisory Fee Summary

A new option will be added to suppress the **Average Fee %** column from the **Advisory Fee Summary** sub-report in report builder.

Payee Report

To clarify the negative amounts that appear on the payee report, the following note has been added to the report:

[“Negative amounts shown represent refunds and are from cancellations or other adjustments. The corresponding original invoiced amounts associated with any refunds are also shown for your reference.”]

Model Tolerance Report

The Model Versus Post-Rebalance Portfolio Composition subreport from the **Model Tolerance Report** is being enhanced to break out the assets that are included in the Model Versus assets that are not in the model. This improvement will give the subreport the same feature as the current Model Versus Actual Portfolio Composition subreport.

A new optional “Out of Bounds %” column may be included in the model tolerance report. The out of bounds percent will show the comparison between the amount that is out of balance to the target amount as a percentage.

Quarterly Performance Evaluation (QPE)

QPE Index Assignments

For databases that run QPE for registration level grouping, the report will now include all indexes assigned order for any models, management styles, accounts, or asset classes contained within the registration.

QPE Activity Summary

A new option will be created to have detailed activity or a summary of the activity. Detailed information will have a row for contributions, distributions, transfers in and out, dividends and interest paid in cash, miscellaneous charges, and advisory fees paid (optional). This is the display currently used on the QPE. If detailed information is not selected, then the sum of the contributions, distributions and transfers in and out will appear as one number and will be labeled Net Cash Flow. The other items will still appear in separate rows with their current options available.

Performance Tracking Report

The Performance Tracking Report will include options to run IRR or simple rate of return as alternatives to the current method of time-weighted return.

Previous Year Quick Date

A previous year quick date option will be added to all reports that require a date range.

Assets Under Management by Management Style for Representative

Users will be able to enter a date range for this report. Currently, this report runs for the current day and compares the values to the previous business day.

Footer on Reports

The household name will be added to the footer of each page on all Orion client level reports. This will allow you to see the household name no matter what page you are reviewing for the particular report you are running.

Advisory Fee Invoice in Report Builder

The pay method descriptions are being added to this sub-report in Report Builder. The pay methods consist of Direct, Indirect, Credit Card, Check, ACH, No Fee, Non Managed, and Special Instructions.

II) Screen and Navigation Enhancements

We are in the process of enhancing the navigation of *Advisor Desktop* to make the experience more user-friendly and get you the data you need in fewer clicks.

Below are just a few features we will implement in the August 2010 build:

- **Top menu and side menu functionality similar to the Orion website**
- **A “recently visited pages” section will store the recent areas you visited within the application for quick “return to” functionality**
- **Data relevant grid defaults for all areas of the application that use a grid layout**
- **Customizable landing page when entering *Advisor Desktop***

See Advisor Desktop on Page 9.

Advisor Desktop, continued from Page 8.

III) Broker/Dealer Commission Files

Orion is building an interface with the DST IDC files. The DST IDC files will provide Orion commission information that can be added to DST Fanmail transactions that are already being imported into the Orion system.

Advisory firms will then be able to run data queries and reports from the Orion system that will show commissions for the selected date range by representative, fund family, etc. Orion is also exploring the opportunity to append commission data from brokerage platforms to transaction data within the Orion system. This functionality allows firms to tie out commissions received to exact transactions within the Orion system.

Orion will also be developing the use of the Pershing CAPS file for tracking commissions. Advisors who subscribe to this system will be able to use the information from these files within the *Advisor Desktop* system.

IV) Orion's Wall

Keeping up-to-date on the front page activities of your business can be a challenge. Because of this, Orion is developing "Orion's Wall." This functionality will resemble the wall feature from popular social networking sites. Daily business metric items will be posted to your wall the instant the information are available. These metric items may include the number of new accounts created for a day, number of transactions imported for a day and/or the name of a model that has been rebalanced.

You will then be able to select any of these postings to drill down and get more detailed information on what is taking place.

You will have the ability to add comments to the wall. Wall comments will be able to be added by the advisor, the advisory staff, and the Orion service teams. When comments are created, an email notification will be sent to alert interested parties that a new posting has been made.

Postings will also be able to be categorized. Categories may be enabled or disabled, so you only see items that you want to see on the wall. Items on the wall can be set to show in groups by date, week, or month. Also, items can be archived, so when they are removed from the active wall, you still have access to archived items. Let Orion's Wall be a new doorway of the front page activities to your business!

V) Cost Basis Method Assignment

The new cost basis method assignment option allows

advisors to set default methods for different product types. For example, mutual funds can be set to average cost and stocks can be set to high cost. Any report that returns cost basis will use these default settings.

There will also be an override available at the account level so different accounts can use differing methods while being in the same report batch run. The report will have an option to use the default or let the user select which method to use for each product type.

This added flexibility that will allow advisors to run multiple accounts in the same batch report run, while letting each account have differing cost basis calculation methods.

VI) New Dividend Rate Import

Orion is developing an import to receive dividend rate information from Interactive Data Services (IDC). IDC is a more complete provider of dividend rate information which will provide accurate reporting measures for reports that utilize this data. This import will serve to supplement the dividend rate information that is currently being received from other sources.

VII) Enhanced Web Pages

The report generation screens on the website have been upgraded to take advantage of newer input controls already in use throughout the site. This also includes more searching capability when selecting the entity to run the report for. One new feature when running a report for a single entity, includes automatically sending the report to the logged in user's inbox if the report is not able to be generated within 60 seconds. A new batch report tool has also been created to replace the existing "Run for Multiple" feature. With this new batch report tool, it is now possible to create custom groups of clients, registrations, or accounts to run a report. In addition, that specific batch report group can also be saved and reused for future report runs.

VIII) Secure Documents

Orion is developing the ability to store documents securely on the website. With this functionality, you will have the ability to create folders to categorize the types of documents you want to store. You can also allow other users to view these folders in a 'read-only' fashion. *

COMING SOON: Report Updates in November RELEASE - Gross of Fees vs. Net of Fees Performance Numbers & Composite Reports