

Orion:

User Set Up for Client Portal



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Verify client's Household is set up properly with all appropriate accounts

Orion Apps → Portfolio Audit → Households, search Household name → right click row, edit Household → add contact info including name, mobile phone & email address, hit save.

- ▶ Orion Apps → Manage Users → upper right corner, click Actions → New User
- ▶ Enter client name or household ID → verify client email and mobile number are correct, then hit save.
- ▶ A box comes up for you to either see the temp password OR Orion can push out a link email to the new user (easier for client and recommended).
- ▶ Orion pushes Link:
- ▶ Client receives email and will click on the link, which takes client directly to Change Password Screen. Client creates new password and hits enter, immediately is logged in.

Video Examples:

[How to Give Clients Orion Access](#)

[How to Customize Clients Portals](#)



Email Example:

Password Request

NoReply@OrionAdvisor.com <NoReply@OrionAdvisor.com>

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To: cxtestingdemo@outlook.com <cxtestingdemo@outlook.com>

Hello (Client Name)!

A new user login has been created for you in the Bison Wealth system. Please use the username and link below to set your password and complete the sign up process.

cxtestingdemo@outlook.com

<https://login.orionadvisor.com/login.html?reset=b27cdd4c-1222-4fc0-a125-381d726981db&q=cf9d9099-4969-4466-a27d-ab8ada9fcc18>

This link will expire in 24 hours. THIS MESSAGE AND ANY ATTACHMENTS ARE CONFIDENTIAL, PROPRIETARY, AND MAY BE PRIVILEGED. If this message was misdirected, Orion Advisor Solutions, LLC and its affiliated entities, ("Orion") do not waive any confidentiality or privilege. If you are not the intended recipient, please notify us immediately and destroy the message without disclosing its contents to anyone. Any distribution, use or copying of this e-mail or the information it contains by other than an intended recipient is unauthorized. The views and opinions expressed in this e-mail message are the author's own and may not reflect the views and opinions of Orion, unless the author is expressly authorized by Orion to present such views or opinions on its behalf. All email sent to or from this address is subject to electronic storage and review by Orion. Although Orion takes measures to guard against electronic viruses, it does not accept responsibility for any damage whatsoever caused by viruses being passed.

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