

Bringing Business Into Focus!



Bringing the convenience of Orion Advisor Services, LLC into the simplicity of ACT!

The smart use of technology can make your firm more profitable and more responsive to clients. In addition, proper use of technology can also help reduce the number of vendor relationships and software applications that advisors and office staff must manage while providing a more holistic view of clients' accounts.

You may already be familiar with the comprehensive back office support of Orion Advisor Services. Orion helps advisors by taking care of the day-to-day administration and reporting of client investments, trading, billing and more. Couple this with the ease and simplicity of the ACT! contact management system, and you have all the tools in one location for quick, comprehensive on-the-fly reporting.

Why AFFIX?

COST EFFECTIVE

We understand you have options and know that because you have either chosen ACT! or are evaluating this contact management system that you appreciate not having to pay a monthly charges. Also, ACT! is simple and very robust when it comes to organization, tracking and planning for investment advisors. Affix for Orion services is designed with the same idea. No monthly charges and a very cost effective way to incorporate Orion into ACT!. Once you purchase the license, you own it.

EASE OF USE

Designed for advisors and staff, Affix incorporates the most important features into ACT! and nothing more. Easily link ACT! contacts and have all their information at your fingertips when a client calls. From notes, history of conversations and emails that ACT! provides, now have account values, history, reports and statements ready to review and answer any questions clients or prospects may have.

Just a few of the features include:

Familiar Reports—Portfolio Valuation, Time Weighted Return, Transactions, and view the Portfolio Snapshot.

Orion Statements—Call statements on the fly while the contact is on your ACT! screen.

Advisor Snapshot—Always know assets under with Orion each time your personal ACT! profile is called up.

Easy Link Process—Quickly identify and link new contacts from ACT! to Orion.

Simplicity—Includes only the most important features so staff can take care of client calls or tasks.

Integrated Login—Login to Orion is seamless using the ACT! login.

Free Updates—Included with the first year of service. Nominal cost after the first year.

Contact: Data Pavilion, Inc.
www.datapavilion.com
support@datapavilion.com
720-255-8843
PO Box 301
Eastlake, CO 80614

Frequently Asked Questions



Which versions of ACT! is Affix compatible with?

Affix for Orion is tested and compatible with ACT! 2008 and 2009. If you do not have one of these current versions, you will find the upgrade price reasonable and with quite-a-few changes that will be useful in your practice. As new ACT! versions are released and as Orion rolls out new features we will continue to ensure enhancements and compatibility are available for current subscribers.

Is the data from Orion to Affix secure?

Affix uses the same encryption as if you were using the Advisor Desktop or on the website viewing your client's data. It is important to continue proper security measures including entering your ACT! login each time you use the system for internal controls.

How do I link contacts from ACT! to Orion?

Linking contacts between the two systems is very simple and only needs to be done once. You will find a tutorial video on the website to help you with this. After the initial linking when first installing the software, you will find a link button on the screen of every ACT! contact. In addition, if you find multiple contacts not linked you have an option in your "Tools" menu inside ACT! to link multiple contacts. You can also sort contacts in ACT and link groups at a time.

What if I need assistance or have a problem?

Support is included free for the first year and to those who maintain their subscription after the initial year. You will find a help button in ACT! to email a description of the problem you may be having. Most problems are with ACT! or the connection to Orion Advisor Services, LLC. We cannot support either of those two systems, but if you have trouble with the install or otherwise, please let us know by emailing support@datapavilion.com

What is the process for getting started?

Please review the website for detailed instructions. Once you verify you have the proper ACT! version and purchase the licenses, there are a few items that need to be completed. You will be emailed an Orion document that needs to be signed and faxed to your service team to finish establishing the connection to Affix. **Note:** While you can download and install the software, the connection CANNOT be made until this is complete. Your standard Orion login will not work.

How many licenses will I need?

You will need to purchase the same number of Affix licenses that you have of ACT!. We have kept the price low compared with other solutions making this a must have for your office staff.

What is the cost to use Affix?

The cost per license is \$199 This includes the first year of upgrades and support. There is a one time set-up charge of \$129. If you wish to continue your service using Affix and to continue receiving enhancements and ensure compatibility with future releases of ACT! and Orion updates, the reduced annual charge is \$129 per license per year.

Do I need to sign any kind of contract?

No.