

How to Create a New User in Orion Advisor

1 Navigate to api.cloud.orionadvisor.com/orionconnectapp/#/or...

2 Click "Manage Users"



The screenshot displays the Orion Advisor navigation menu on the left side of the screen. The 'Manage Users' option is highlighted with an orange circle. The main content area shows a line chart with data points for the dates 06/30/2023, 07/31/2023, and 08/02/2023. The chart has two lines: a blue line at the top and a yellow line at the bottom. To the right of the chart is a legend titled 'MODEL' with various investment strategies listed, including Cornerstone 50 - Gro, Cornerstone 70 - Gro, Cornerstone 60 - Mo, Polen Focus Growth, Cornerstone 35 - Cor, Cornerstone 85 - Foc, Cornerstone 100 - Eq, 3edge Conservative, and Cabita Short Term.

3 Check if there is an existing login/user for the client. We want to do this first to avoid creating a duplicate user.

4

Check for both inactive and active users. Under "Show Active" on the right toolbar, select "Both"

687	Nancy ...	Defaul...
668	Dave ...	Defaul...
664	Kevin ...	Defaul...
667	Jim & ...	Defaul...
691	Sharon...	Defaul...
694	Bob & ...	Defaul...
689	Ajay &...	Defaul...
682	Molly ...	Defaul...
857	Peter A...	Defaul...
670	Bob W...	Defaul...
785	Mike ...	Defaul...
772	Samue...	Defaul...
767	John &...	Defaul...
913	Barbar...	Defaul...
859	Brian ...	Defaul...
936	Lee & ...	Defaul...

Filters

[add filters](#)

No filters exist for this view

Columns ▼

Groupings ▼

Show Active ▲

Active

Not Active

Both

5

Search by their last name and/or email. If user exists but is inactive, right click and activate the user. Once you have confirmed a user does not already exist, continue with the following steps.

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[Home](#) > [Manage Users](#)

ID	User ID	First Name	Last Name	Email	Entity I...	Name
270	allenbrisk	Allen	Brisk	allenbrisk@comcast.net	768	Allen
342	baxnan	Nancy	Baxter	nancy.baxter@imail.org	687	Nancy
352	ldactor	David	Actor	ldactor227@yahoo.com	668	Dave
360	tales4u	Nancy	Alder	tales4u@gmail.com	664	Kevin
365	shannon4623	James	Andersen	shannon4623@gmail.com	667	Jim &
370	sharonabaxter	Sharon	Baxter	nanook_is_alive@yahoo.com	691	Sharo
375	dob@xmission.com	Debra	Bushek	dob@xmission.com	694	Bob 8
386	mgerritsen@comcast.net	Mary	Gerritsen	mgerritsen@comcast.net	689	Ajay &
390	mollyhoo11	Molly	Glaser	mollyhoo11@gmail.com	682	Molly
412	peter.athas@yahoo.com	Peter	Athas	peter.athas@yahoo.com	857	Peter
487	bobwalden	Robert	Walden	bobwalden@live.com	670	Bob V

6 Click "Actions"

The screenshot shows a user management interface. At the top, there are navigation links for "Contact Us", "Notifications", and a user profile for "Kelsey Dent". Below this is a table of users with columns for "Entity I...", "Name", "Role", "Active", and "Last Login". The "Active" column contains green checkmarks. A blue "Actions" dropdown menu is highlighted with an orange circle. To the right of the table is a sidebar with a "Standard View" dropdown, a "Filters" section with "add filters" and "No filters exist for this view", a "Columns" dropdown, a "Groupings" dropdown, and a "Show Active" section with radio buttons for "Active", "Not Active", and "Both".

Entity I...	Name	Role	Active	Last Login
1492	Dave ...	Defaul...	✓	2023-07-30
2445	Roger ...	Defaul...	✓	2023-07-29
999	John &...	Defaul...	✓	2023-06-29
1783	David ...	Defaul...	✓	2023-07-27
1794	Yuen L...	Defaul...	✓	2023-07-13
916	David ...	Defaul...	✓	2023-08-02
1276	Dave ...	Defaul...	✓	2023-07-21
1280	Randy ...	Defaul...	✓	2023-07-23
2349	Georg...	Defaul...	✓	2023-08-01
1292	Larry ...	Defaul...	✓	2023-06-30
1623	Scott ...	Defaul...	✓	2023-08-01

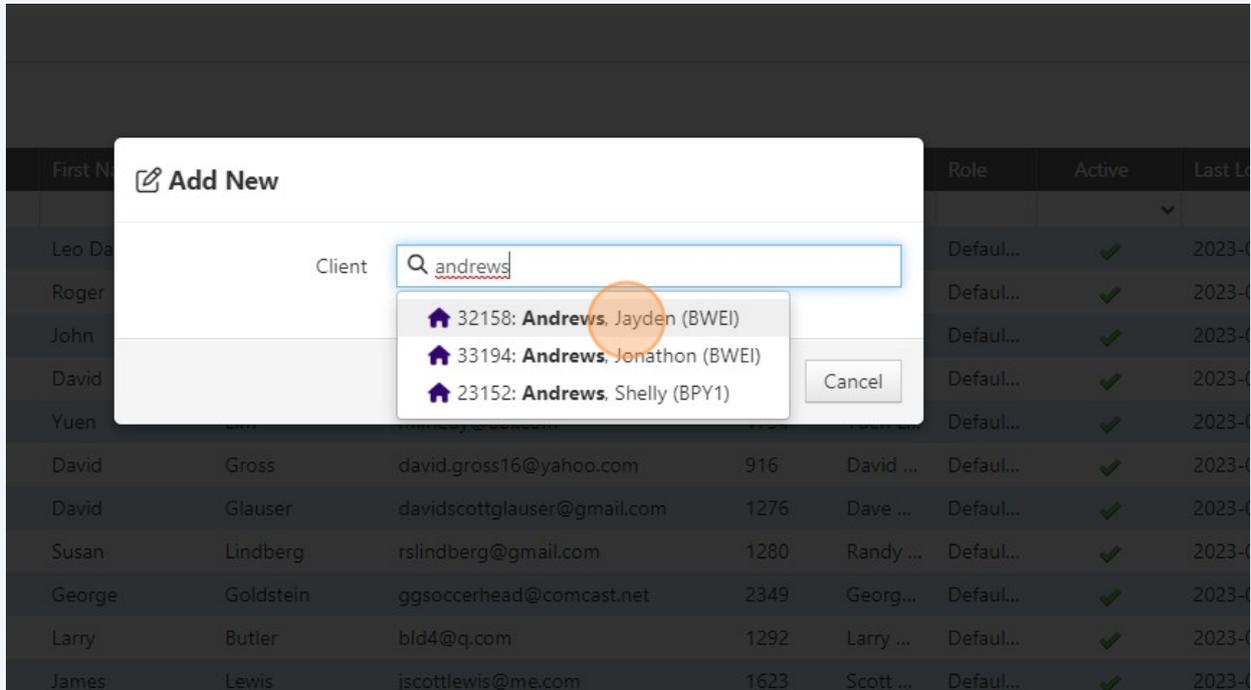
7 Click "New User"

The screenshot shows the same user management interface as in step 6. The "Actions" dropdown menu is now open, and the "New User" option is highlighted with an orange circle. The other options in the menu are "Export to Excel" and "Activate User". The rest of the interface, including the table and sidebar, remains the same.

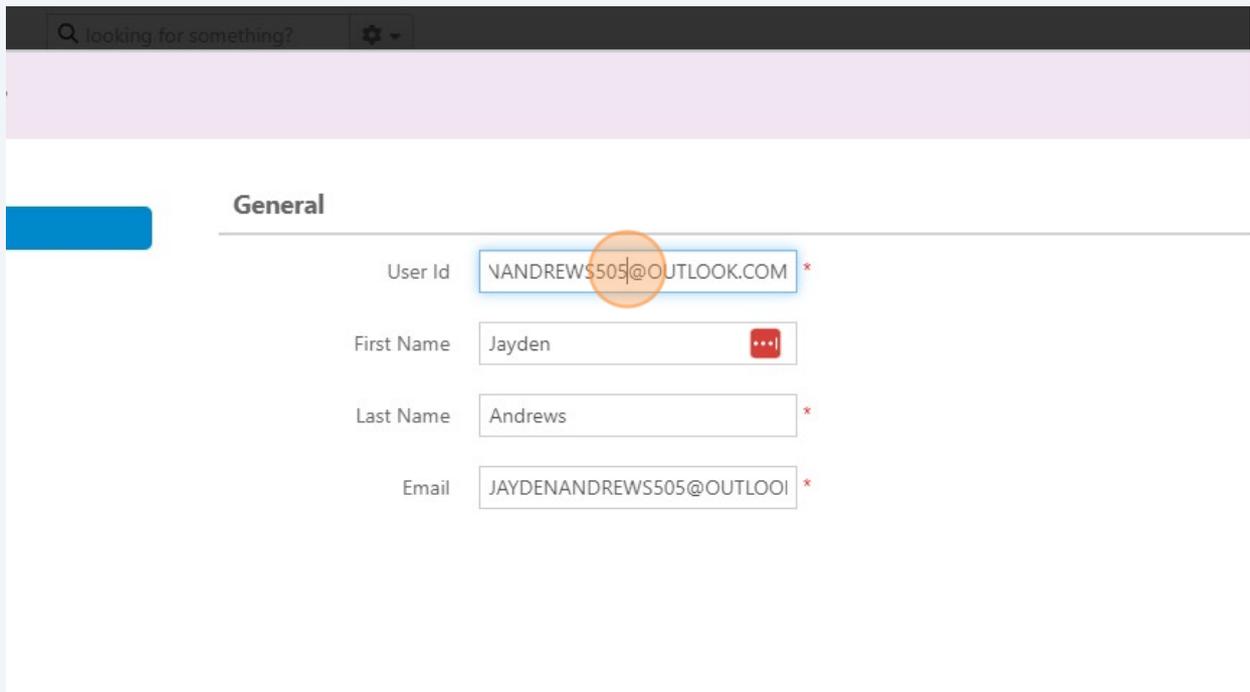
Entity I...	Name	Role	Active	Last Login
1492	Dave ...	Defaul...	✓	2023-07-30
2445	Roger ...	Defaul...	✓	2023-07-29
999	John &...	Defaul...	✓	2023-06-29
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916	David ...	Defaul...	✓	2023-08-02
1276	Dave ...	Defaul...	✓	2023-07-21
1280	Randy ...	Defaul...	✓	2023-07-23
2349	Georg...	Defaul...	✓	2023-08-01
1292	Larry ...	Defaul...	✓	2023-06-30
1623	Scott ...	Defaul...	✓	2023-08-01

8 Type Client's Name

9 Click on the household you want to create the user for

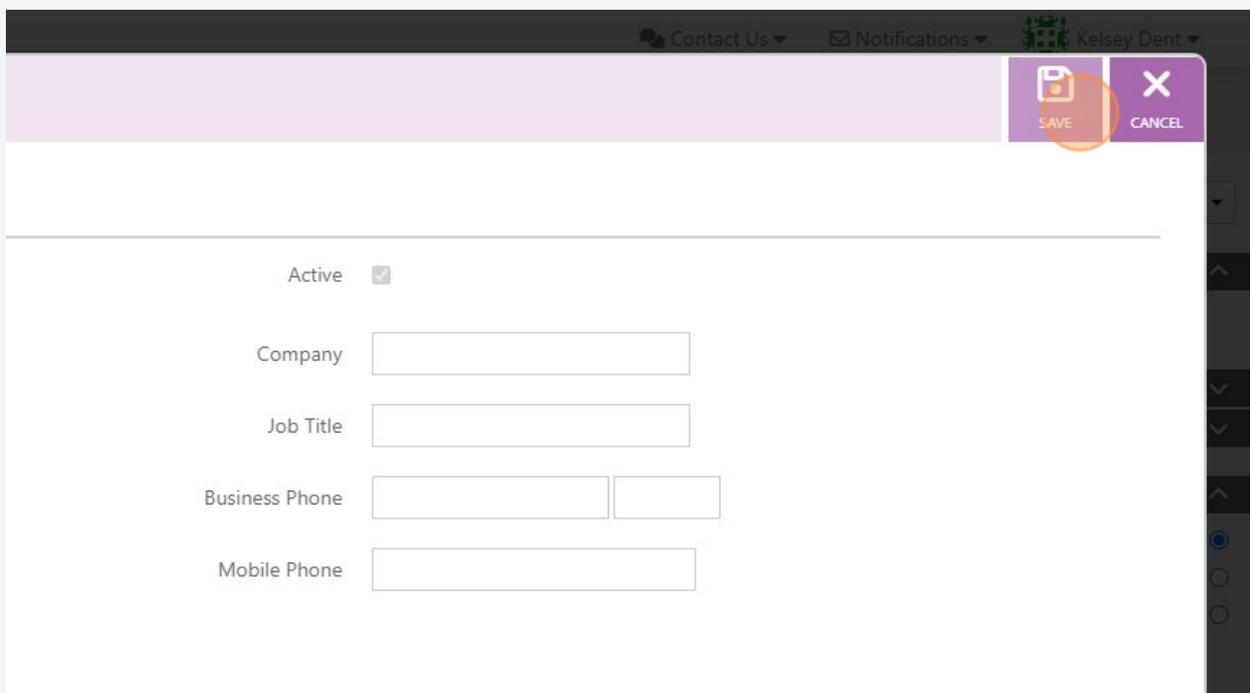


10 Create the user ID. This can be their email or whatever the client wants.



A screenshot of a web application interface. At the top, there is a search bar with the text "looking for something?" and a settings icon. Below this is a light purple header bar. The main content area is titled "General" and contains a form with the following fields: "User Id" (value: NANDREWS505@OUTLOOK.COM), "First Name" (value: Jayden), "Last Name" (value: Andrews), and "Email" (value: JAYDENANDREWS505@OUTLOO). The "User Id" field is highlighted with a blue border and an orange circle around the text.

11 Click "SAVE"



A screenshot of a web application interface. At the top, there is a navigation bar with "Contact Us", "Notifications", and "Kelsey Dent". Below this is a light purple header bar. The main content area is titled "General" and contains a form with the following fields: "Active" (checked), "Company", "Job Title", "Business Phone", and "Mobile Phone". The "SAVE" button is highlighted with an orange circle.

12 Click "OK" to "Show me the temp password"

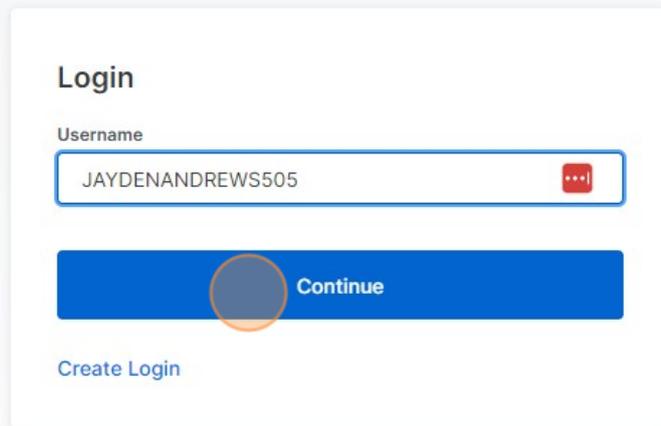
The screenshot shows a 'New User' form. A modal window titled 'New User' is open, showing a 'Password Delivery' dropdown menu with the option 'Show me the temp password' selected. The 'OK' button is highlighted with an orange circle. In the background, the 'New User' form is visible, with fields for 'Active' (checked), 'Company', 'Job Title', 'Business Phone', and 'Mobile Phone'. The 'OUTLOOK' field is also visible with an asterisk.

13 Copy the temp password and click "okay"

The screenshot shows a 'Temporary Password' dialog box. The text reads 'The temporary password is: tJvDkbcRnd'. The password is highlighted with a blue selection bar, and an orange circle is placed over the end of the password. An 'OK' button is visible in the bottom right corner of the dialog box.

14 Open a NEW Orion tab

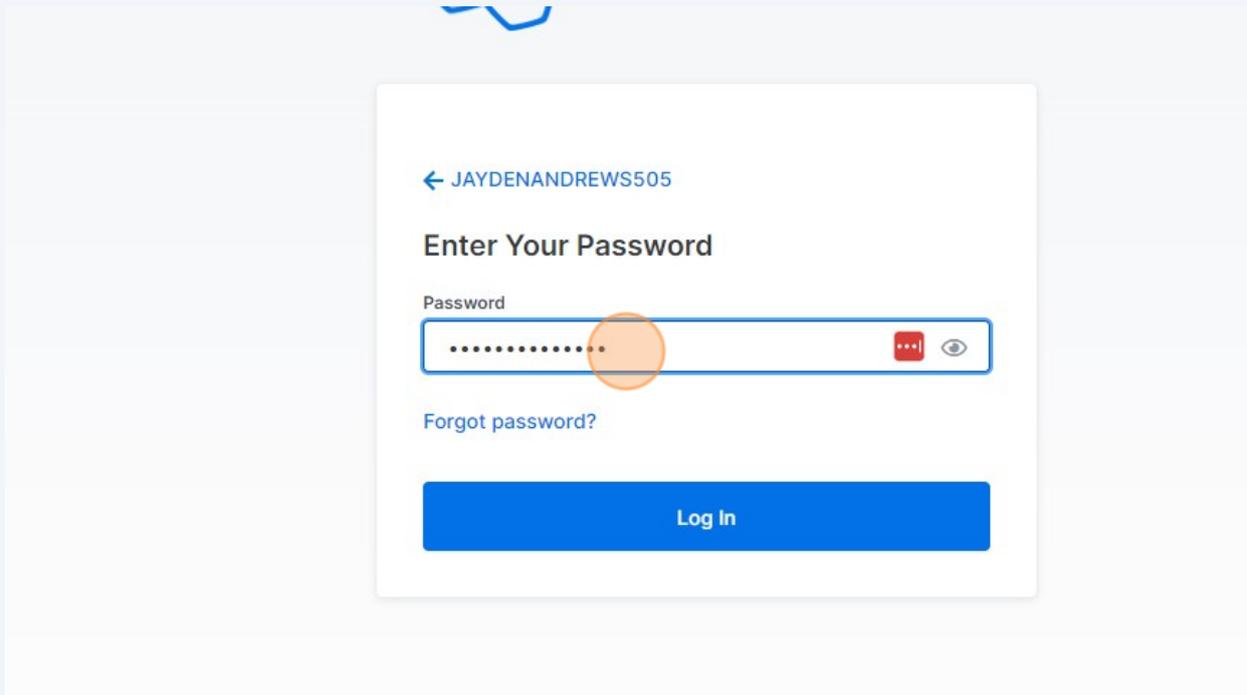
15 Enter the username for the client that you just created.



The screenshot shows a login interface with the following elements:

- Title:** Login
- Label:** Username
- Input Field:** A text box containing the username "JAYDENANDREWS505". A red eye icon is visible on the right side of the input field.
- Button:** A blue button labeled "Continue" with a circular highlight around it.
- Link:** A blue link labeled "Create Login" located below the button.

16 Paste the temporary password in the password field.



17 Once you click "login" it will send the client a text code and request they set their own password.

