SmartOffice
Orion Integration

Import accounts and positions into SmartOffice automatically

As an advisor, you want to maximize the amount of time you spend servicing your clients and growing your business. Making sure you have up-to-date data about your clients' investments is a large part of that. Unfortunately, updating that data manually is inefficient.

Ebix's SmartOffice, the practice management solution for advisors, can help. Using SmartOffice with Orion's data services, you can automate the process of updating client investment data.

Eliminate Manual Data Entry—and Leverage SmartOffice's Power

With our integration with Orion, your clients' latest account and position data is delivered to SmartOffice directly from Orion. Aside from the initial setup, it's a hands-off experience—updates occur automatically overnight, with no extra effort necessary on your part.

When you sign in to SmartOffice in the morning, your clients' updated accounts are there, ready for your review. The imported data includes updated account status, share price, share balance, tax cost, current value and much more.

With our automated updates, you and your support personnel can get away from time-intensive manual data entry and devote more resources toward productive (and profitable) activities. You'll also avoid the headaches associated with tracking down data irregularities caused by human error.

Best of all, you can use SmartOffice's powerful reporting capabilities to create reports for yourself and your clients based on that fresh data. These reports help you gain a deeper understanding of your clients' needs while keeping your clients better informed about how their money is working for them.

KEY BENEFITS

- Keep client investment updated automatically in SmartOffice.
- Eliminate the need for costly manual data entry.
- Reduce clerical errors.
- Use SmartOffice to create informative, compelling reports for yourself and clients.

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