

## **Client Portal Troubleshooting**

If error messages are received when attempting to login to the AssetBuilder Client Portal for the first time, the following troubleshooting steps may be used:

- The Client Portal should work on all browsers, but is best equipped for Google Chrome.
  - You can click <u>here</u> to download Google Chrome
- Go to Login (orionadvisor.cloud) This link will bypass any cache or cookie errors.
  - Enter your username (your primary email address)
  - Click on "Forgot password"
  - You should receive an email with a link to reset your password that is valid for 24 hours.
- Password
  - Must be at least 10 characters long
  - Must contain a number OR special character
  - o Cannot contain your name, user ID, or email address
  - Cannot contain any variation of the word 'password'
  - Cannot contain a season (ex: Winter, Summer, etc.) or any 4 consecutive numbers such as a year (ex: 2023, 1930, etc.)