

Reconnect Advisor Access in Collage

Collage has recently reintroduced its advisor portal after removing it a couple of years ago.

As part of this change, advisor access is no longer automatically maintained. To continue supporting your team inside Collage, Orchard needs to be reconnected at the account level.

Why this matters

When we're connected inside Collage, we can:

- ⊕ Support employee changes and onboarding more efficiently
- ⊕ Stay aligned with updates happening in real time
- ⊕ Reduce back-and-forth across systems
- ⊕ Help catch issues before they become problems

How to reconnect access

1 Log into Collage

Access your Collage account as you normally would.

2 Navigate to Users

- ⊕ Go to Company Settings
- ⊕ Select Users

3 Invite Orchard as an External User

- ⊕ Click Invite External User
- ⊕ Enter the email associated with your Orchard advisor

4 Assign Access Level

Choose one of the following:

- ⊕ Super Admin (recommended for full support)
- ⊕ Or create a Custom Role with appropriate permissions

5 Send the Invite

Once submitted, Orchard will receive access through the Collage Partner Portal.

Need help?

If you're unsure where to find any of this, you can book time through our calendar and we'll walk you through it.

[BOOK A CALL](#)

Helpful links

- ⊕ [Partner Portal](#)
- ⊕ [Step-by-Step Guide](#)