

SUPPORT CORNER



HOW TO CUSTOMIZE QUERIES AND DEFINED VIEWS

Background

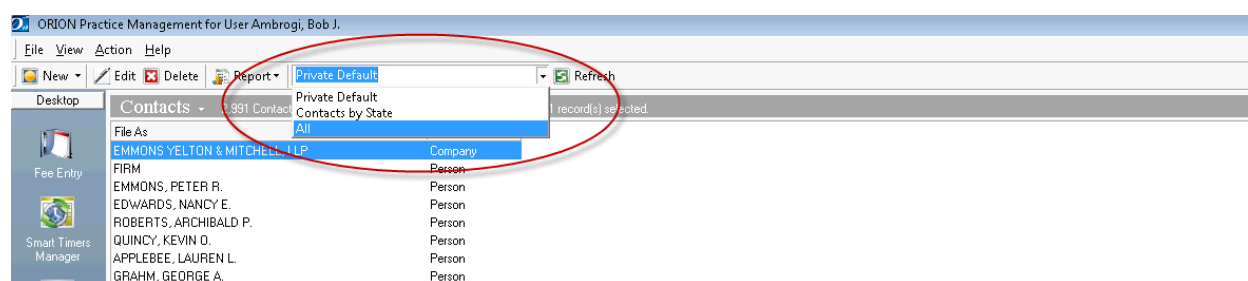
Orion is a robust Contact Relational Manager. It provides many features to assist you in viewing and gathering the right information anytime you need it.

We receive many support questions that revolve around a similar theme, “How do you extract data?” Depending on the specifics of the request, there can be different answers to this question. The most popular is using the custom Query bar.

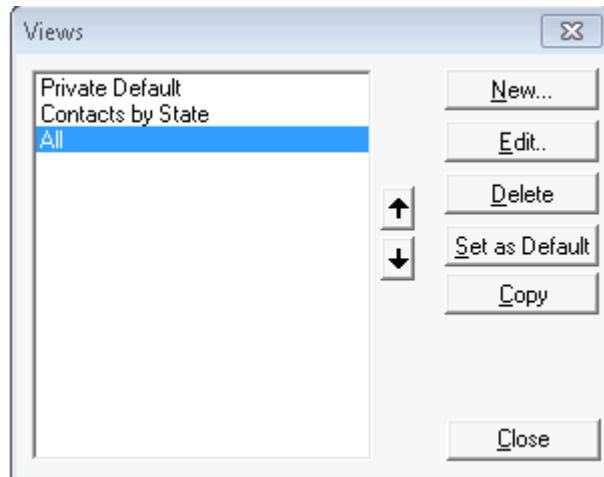
In the below example we will take you through a basic query that allows you to locate all clients in a specific state. Keep in mind the Query bar can handle much more complicated actions that allow for more intensive data mining.

Instructions

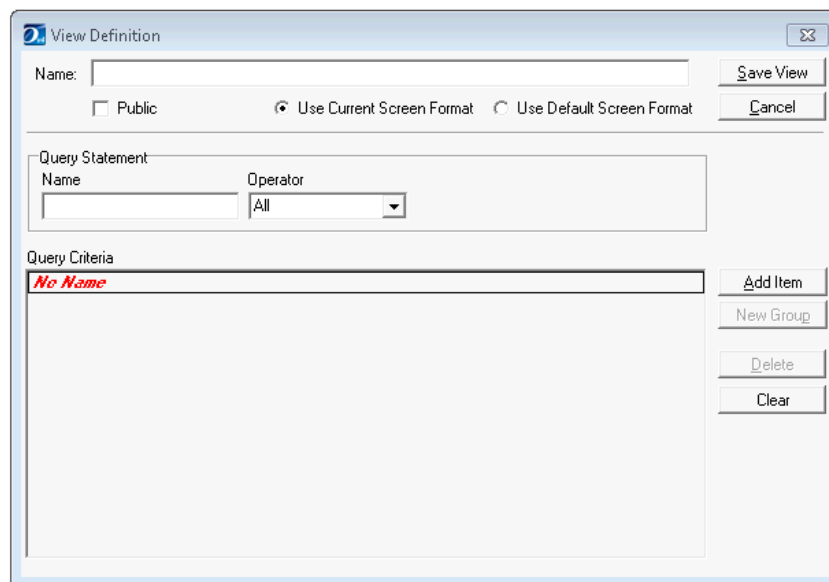
The Query bar is located at the top of the screen (circled below) and contains saved queries.



This list is populated with Queries that are saved in the system. Queries may either be saved privately or publically across all users. To access a list of your Queries, go to the View menu, and choose Define View. From the screen below, you can either create or modify queries. You may also choose a default.



Again, in this example, we want to create a query that will allow us to identify all clients within a specific state. We are going to press the NEW button and be presented with the following display box.



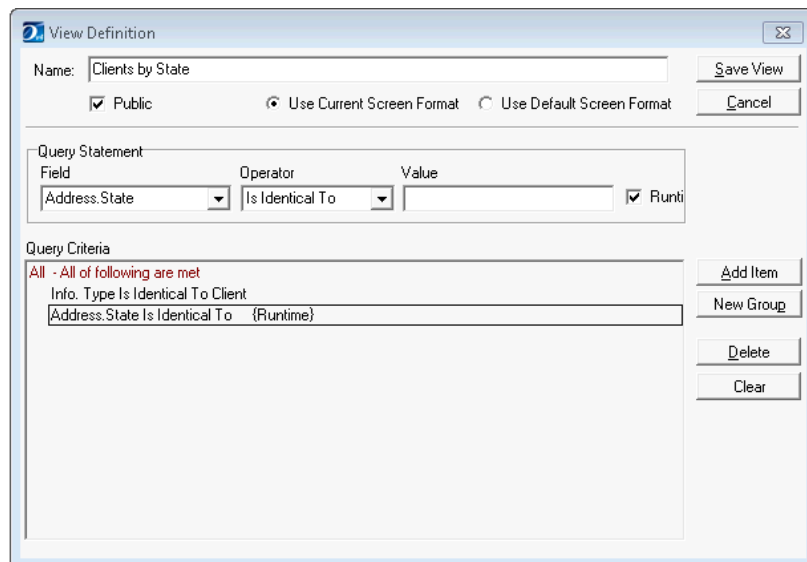
The name field allows us to give the Query a name. From this screen we can mark it as Public (available to other users). You can also decide if you want to use the current screen format or the default. You can customize the main columns in the main contact view, and have that view applied only to specific queries. In the lower panel you can add items which are commands as well as group them together to provide complex logic scenarios.

In this example, we will give it a name and add two bits of criteria,

- Info Type must be a client
- State must equal something

February, 2013

Note: Since I want to run this query multiple times for different states, I'm not going to specify a state in the query. Instead I will check the box next to "Runtimes" which will prompt the user to insert the state that they are requesting.



View Definition

Name:

☒ Public ☒ Use Current Screen Format ☐ Use Default Screen Format

Query Statement

Field	Operator	Value
Address.State	Is Identical To	

☒ Runtime

Query Criteria

All - All of following are met

- Info. Type Is Identical To Client
- Address.State Is Identical To {Runtime}

If we save the view and go back to the main contacts window, we can choose this query from the Query bar. You can now filter the data to match any state you wish.

With the data properly filtered, you can now use any of the reports or exporting options available to you (REPORTING button). For example, you might want to export it to Excel for a mailing list or Word for a mail merge.

Orion has hundreds of customizable fields that can be mined upon. Along with having dozens of operators that help you fine tune the search into the specific formula that you need. Orion also includes any custom fields that your firm may have in custom tabs.

Further Questions? Have a Support Tip idea? Let us know, at support@orionlaw.com.