



How Do We Maintain Drop-Down Values in Fields on Custom Tabs in Orion?

Instructions

Many firms will find it useful to know how to edit the options in a field underneath one of their custom tabs. The screenshot below illustrates the fields we are referring to in Orion.

Contact: Robert Bird

Save and Close Save New Action View Private

General Matters Events Related Journals Documents Emails Mailings Seminars Client Accounting Cert

Firm Mailings

☐ Holiday Card ☐ Fee/Rate Notice ☐ Special Announcements
☐ Holiday Gifts ☐ Firm Announcements ☐ None

Alerts

	Mail	E-mail	Broadcast Media
CA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRBG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Litigation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Referral Source:

- Current Client
- Family
- Friend
- Martindale Hubbell
- Other
- Other Attorney/Firm
- Phone Book
- Print Advertisement

(Continued on Next Page)



Support Corner

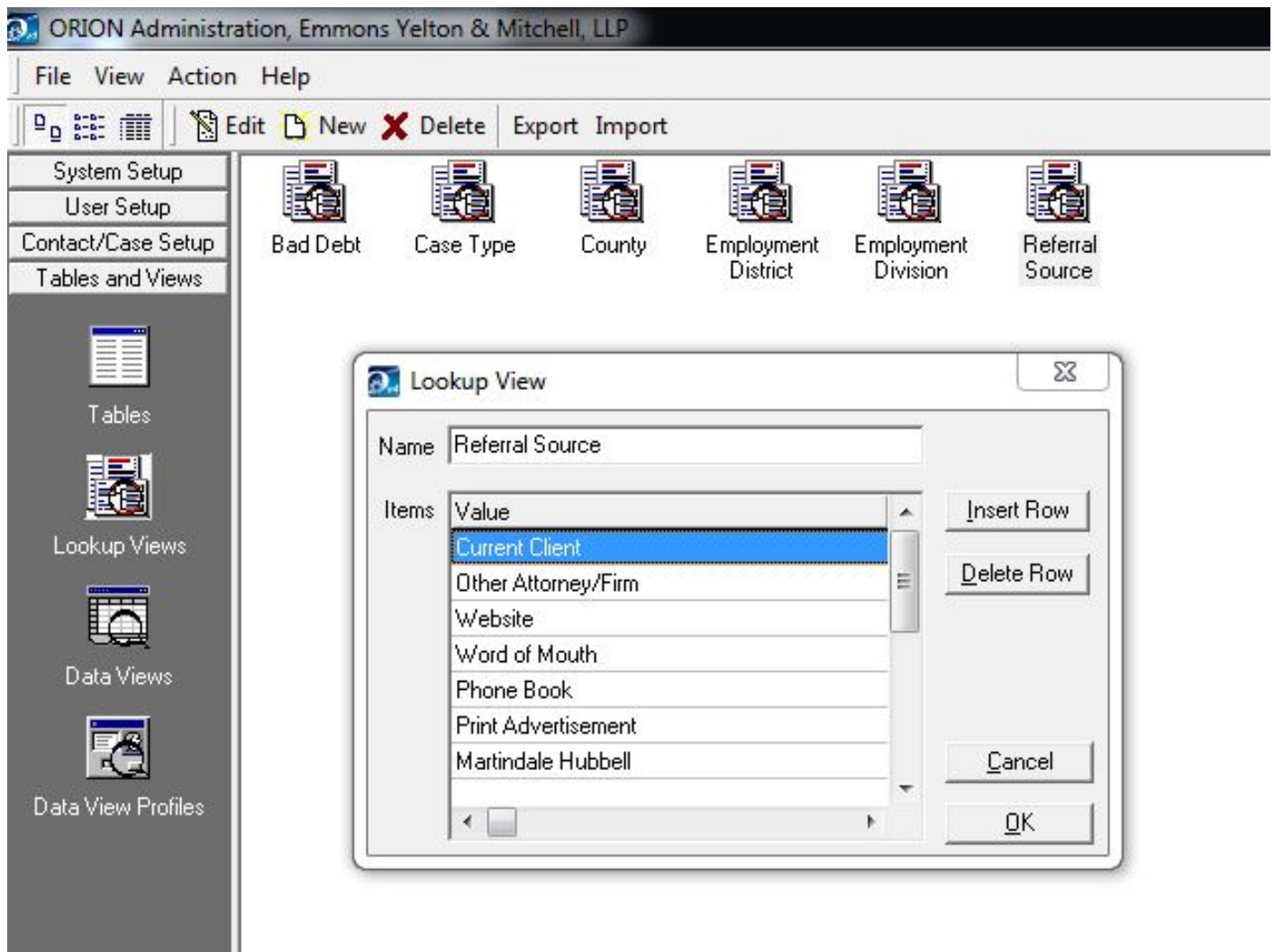
April, 2014

To edit these, go into the Orion Administration, open the Tables and Views section and access Lookup Views.

On the right now you should have the names of the fields, double click the one you want to edit.

Now you'll have the screen where you can edit, insert or delete values.

Press OK when done.



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