How do I create a mailing list in Orion for firm-wide holiday cards or gifts?

It's almost the end of October, and the holidays will be here before we know it. Are you prepared to gather the necessary information to get your cards and gifts out the door on time? In this tutorial, we will show you how easy it is to coordinate a mailing from within Orion.

In order to generate your mailing list, there are a few prerequisite steps that need to be completed. Orion allows for custom Marketing tabs to be added, such as a Mailings tab or Seminar tab shown on the right. On the Mailings tab, custom fields may be added such as "Holiday Card" or "Holiday Gift". This Mailings tab is associated with Contacts based on the Info Type of the Contact. The screenshot on the right shows where the "Holiday Card" and "Holiday Gift" fields are located. These fields must be in place to generate your report.
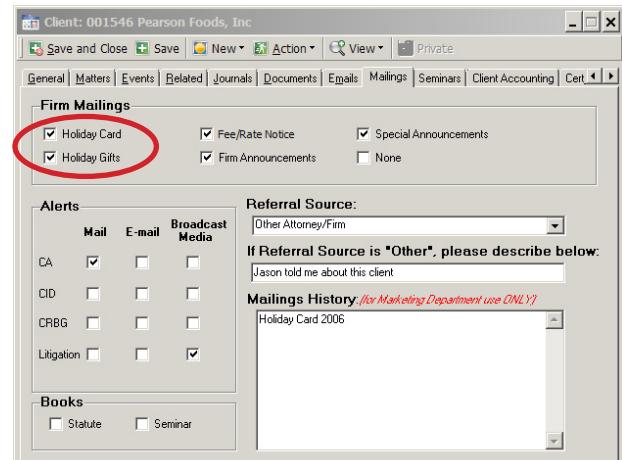
A Query that displays Contacts that have the custom field for "Holiday Card" or "Holiday Gift" mailings selected must also be created. The screenshot below shows the detail of this Query.
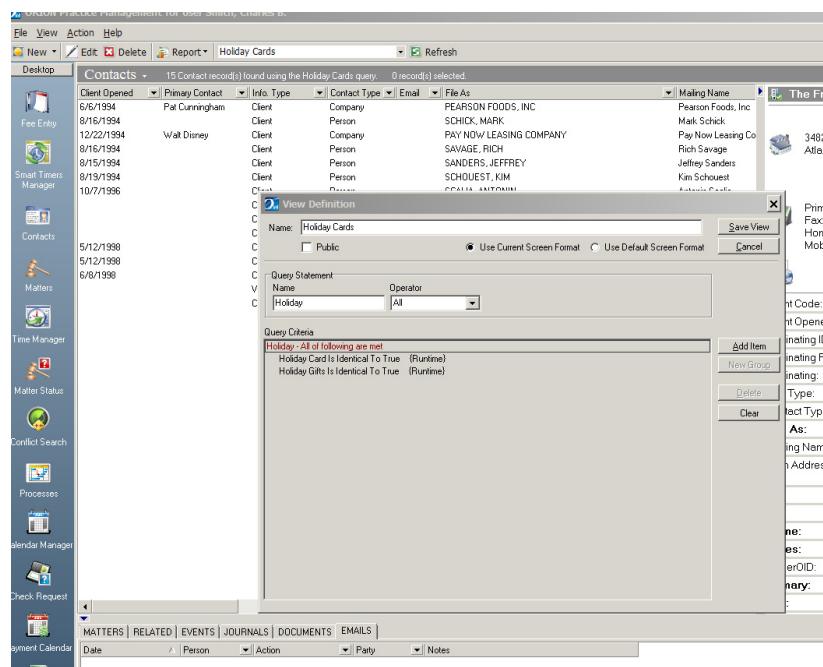
A "Holiday Card" (or "Holiday Gift", etc.) Report must also be set-up to output your Contact names, addresses, etc. in the format necessary for your mailing. The database fields will be edited to display the correct address fields.
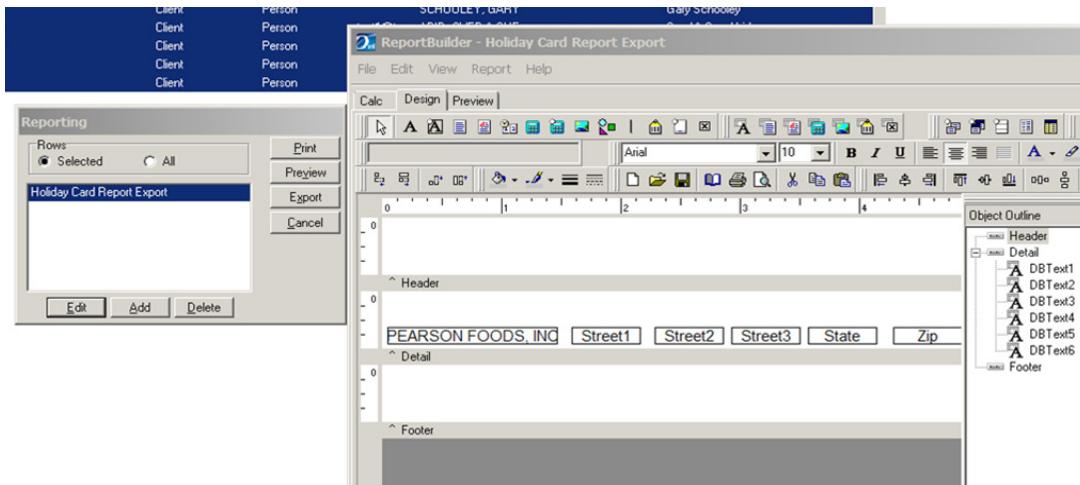
Once these prerequisites are in place, exporting your list for your mailing is a simple task. First, go to Contacts and choose your "Holiday Card" Query from the drop-down menu. Orion will then show your Contacts that have the "Holiday Card" field selected.
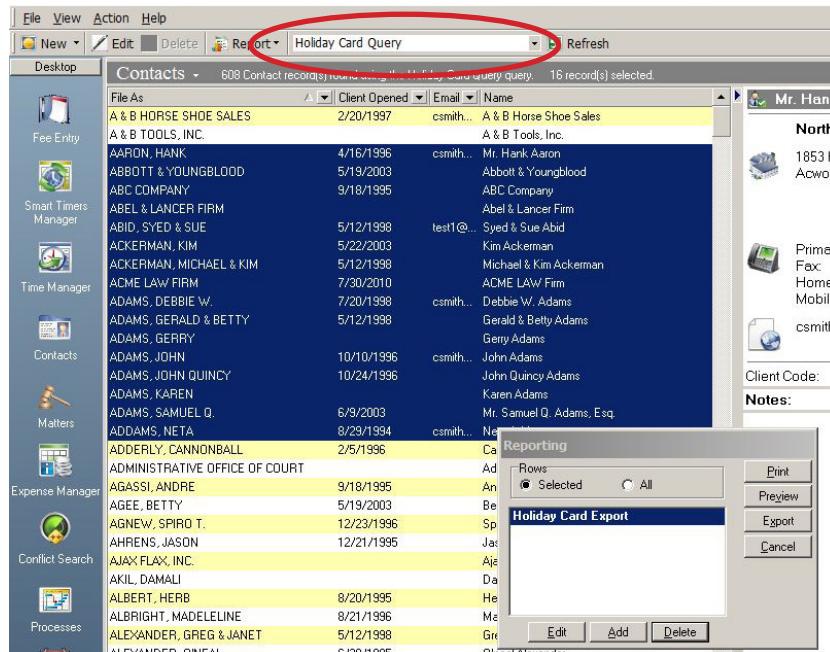
Next, highlight the list of Contacts and click the Report button and select Detail. Then select your "Holiday Card" Report and choose Export to Excel or to Text File. Once data is exported, it may be used to create labels or merge documents.

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