Adding Phone numbers, email addresses and addresses to People and Organisations in Orixa

The Orixa system includes data-tables to store basic contact details such as phone numbers, email addresses and addresses. As People and Organisations may have several of each of these, the system builds in the ability to store as many as necessary. A "Current" field also allows you to mark any of these records "false" if they are no longer in use, but you wish to keep a record of the prior value.

> It is also possible to use Orixa's "CSV Importation" systems to bulk import and bulk export the data in these data-tables. This can be useful if you have large quantities of data in other software programmes and you wish to import it.

Viewing and Adding Phone, Address and Email details

Note the example shows addition of data within the "Organisations" Entity. Identical steps exist for "People", and it is possible to connect other Entities to these tables, so all the explanations below, which apply to records in the Organisations data-table also apply to People, and any other linked Entities.

Organisations Edit Form Phones

In the main data-viewing form for each Organisation or Person, at the bottom of the window, phone, address and email address details are shown (1. and 2. in the image on the left).

These entries are **read only** and cannot be edited. This is done to avoid accidental updates and changes being made to this important data.
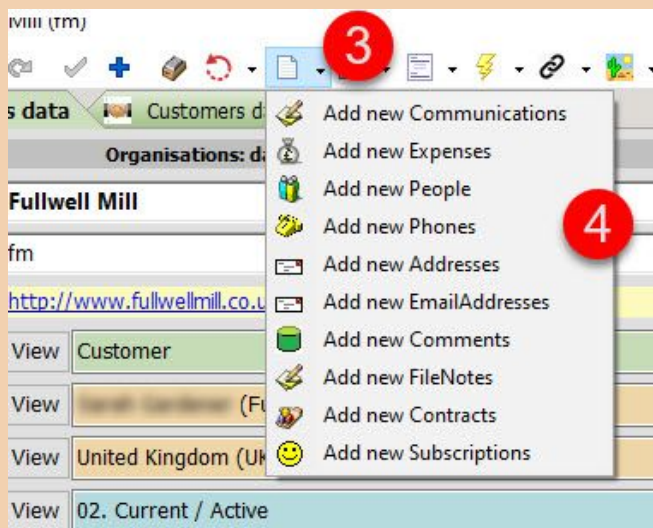
If a person or organisation has more than one entry for each type of data, all the entries will be listed.

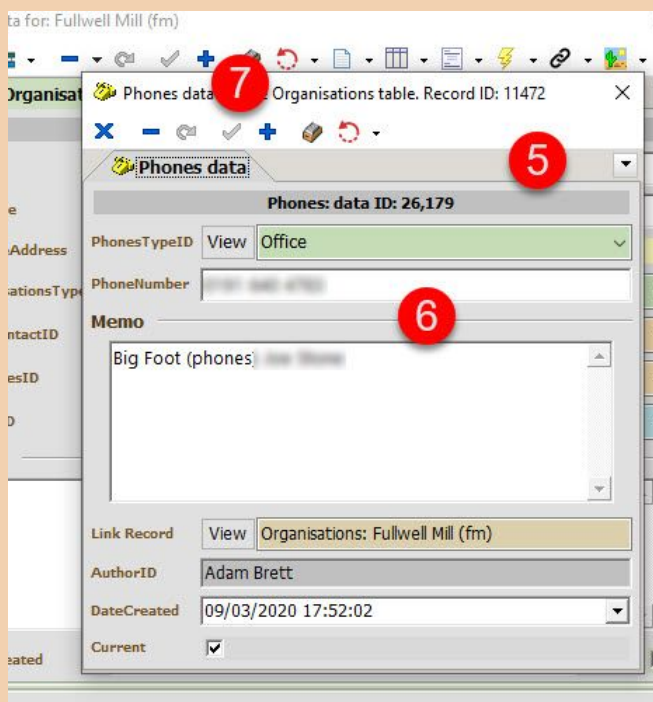If other summary data lists or grids have been added to your App they may also be present on this screen.

Adding new Phone, Address and EmailAddress data

In the main toolbar of the data-viewing form click on the "New Items" button (3), and select "Add new Phones", "Add new Addresses etc., (4).

Note that the content of the "Add New" menu will vary, depending on the Business Objects in your App.

Add new child records

A data-viewing form for the chosen data-table will open (The "Phones" Edit Form is shown at 5.) and a new record will be inserted.

Enter the new data (6.).

Don't forget to click the "Post" button (7.) to save the data to the database.

Note that each data-table includes a field for the "Type" of Phone / Address / Email, and a "Memo" field to hold notes about the record.
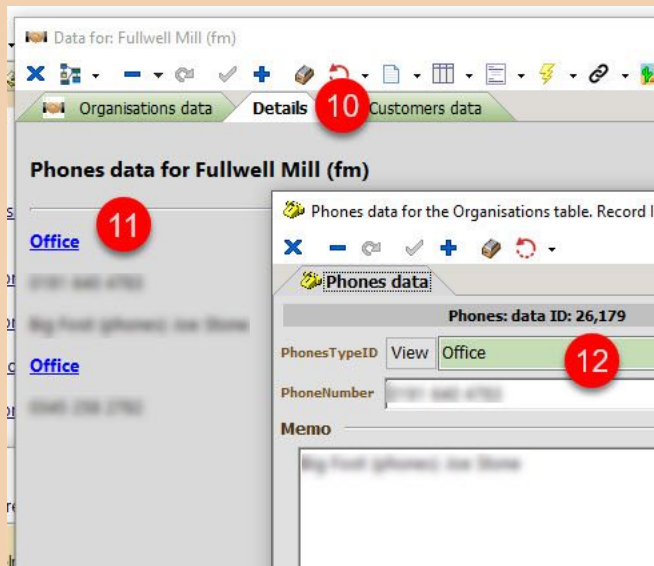
Add Phones

Viewing and editing lists of phone numbers

As well as showing the read only listing of phone numbers on the front page of the data-editing window, the system also allows viewing of this data in a separate "Details" screen, which gives access for updating, editing and deleting records.

To view data for a person, click the "Show Items" button (8.) and select the data of your choice (9.).

View Phones

The Details screen

This shows a listing of the selected data (10.). Click on the blue underlined link (11.) to open a data-editing form (12.).

Remember that the details screen is asynchronous, like all parts of Orixa. If you update data in the Edit Form, updated data will only be shown in the details screen if it is refreshed.

View Phones List, and access individual data

Reports and other outputs from the Phones, Addresses and EmailAddresses Tables

The phones, addresses and email-addresses tables are all full data-tables, just like any others in Orixa.

This means that the values stored in them can be used anywhere in the system, if you write SQL code to extract the data from the data-tables.