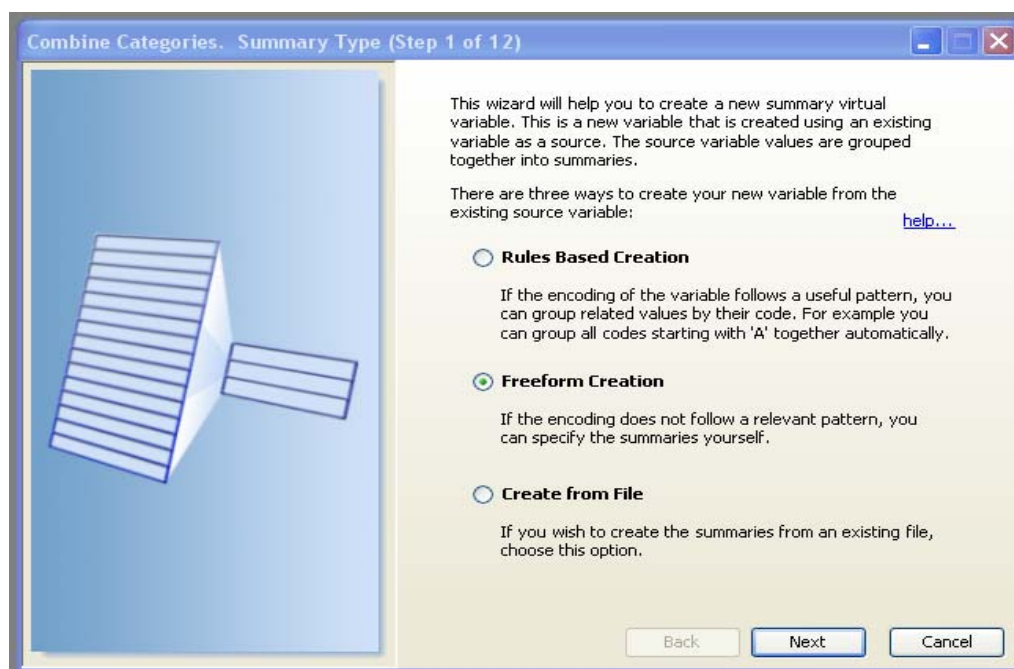# A Guide to Working with Combine Categories Wizard

This Virtual Variable Wizard allows you to create a new virtual variable by taking an existing variable and grouping several codes together to form a new "summary" variable. When this variable is used the selection form allows you to either select the group (which will select all the codes that are grouped) or drill down from the group into the individual codes or select only a few of them.
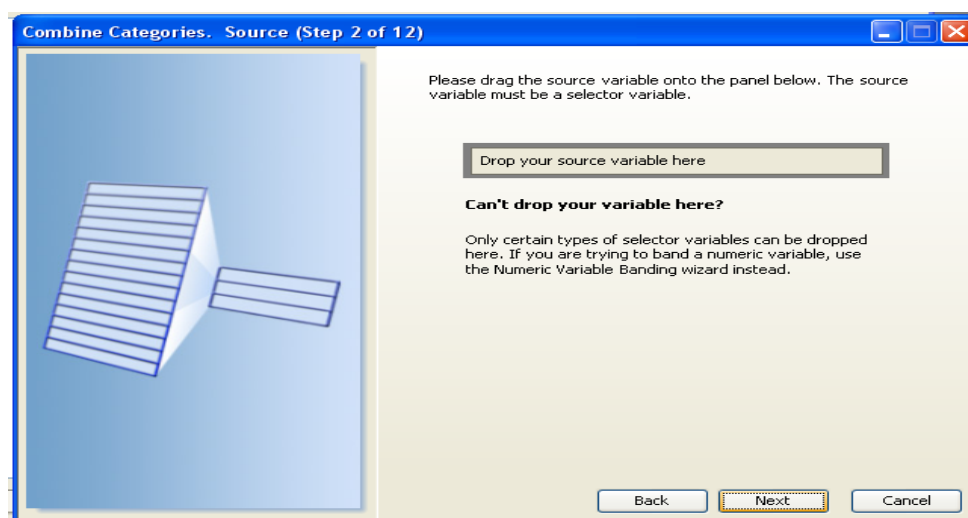
As an example, the Combine Categories Wizard can be utilized to define sales territories by State.

- To begin, click on the [Wizards] tab on the bottom right side of the screen and look for the Virtual Variables. From here click on the Combine Categories Wizard.

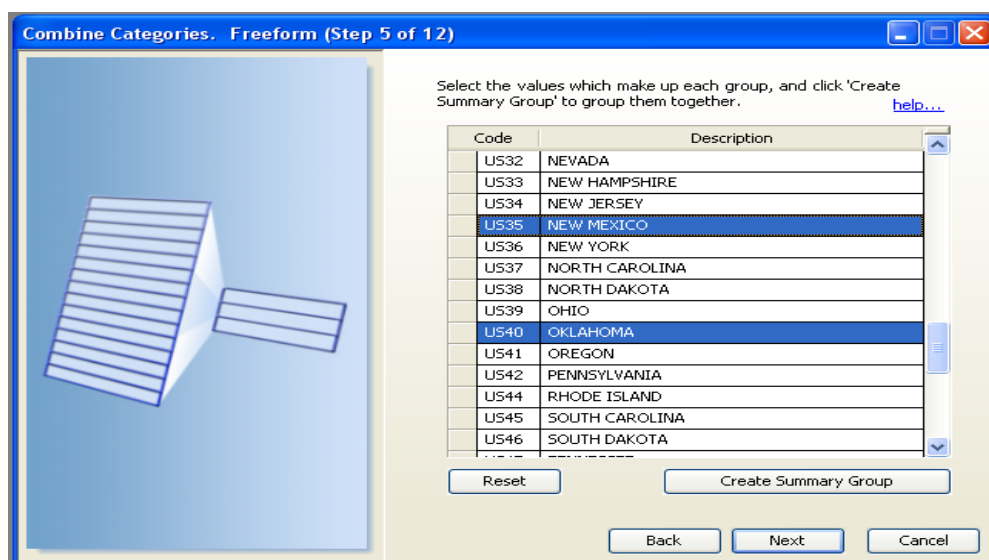- Select the **Freeform Creation** and click on Next

- Drop your source variable that you would like to group by from the System Explorer in the field below.

  o Following the example, on the left hand side go to the Geography folder and look for the State to drop in the field below.
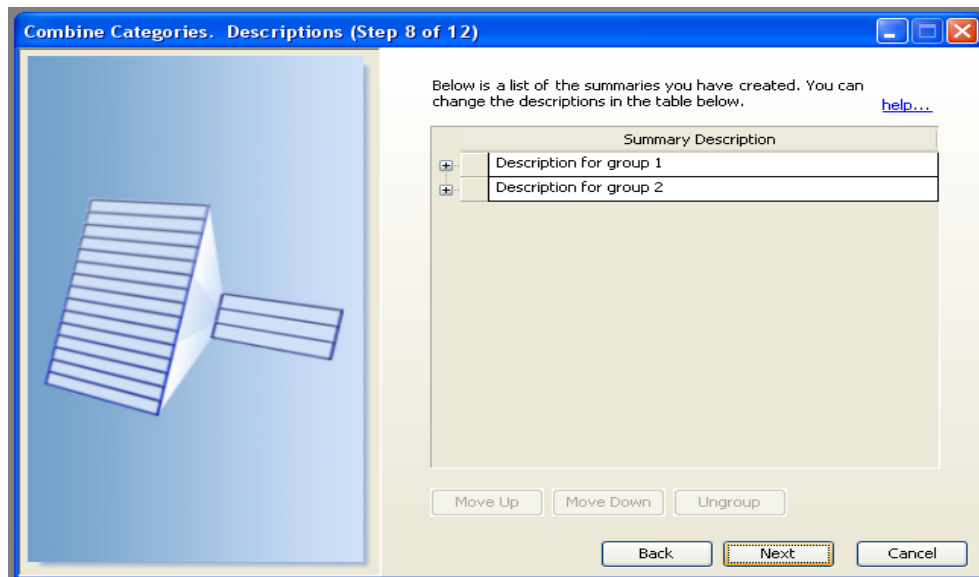

  o Select the States that make up each territory. Like any Windows application, you can use the control and shit keys to select multiple codes.

  o Please note that 2 groups will need to be created: one group that captures the group you need and a second to capture all other States that are NOT part of the group.
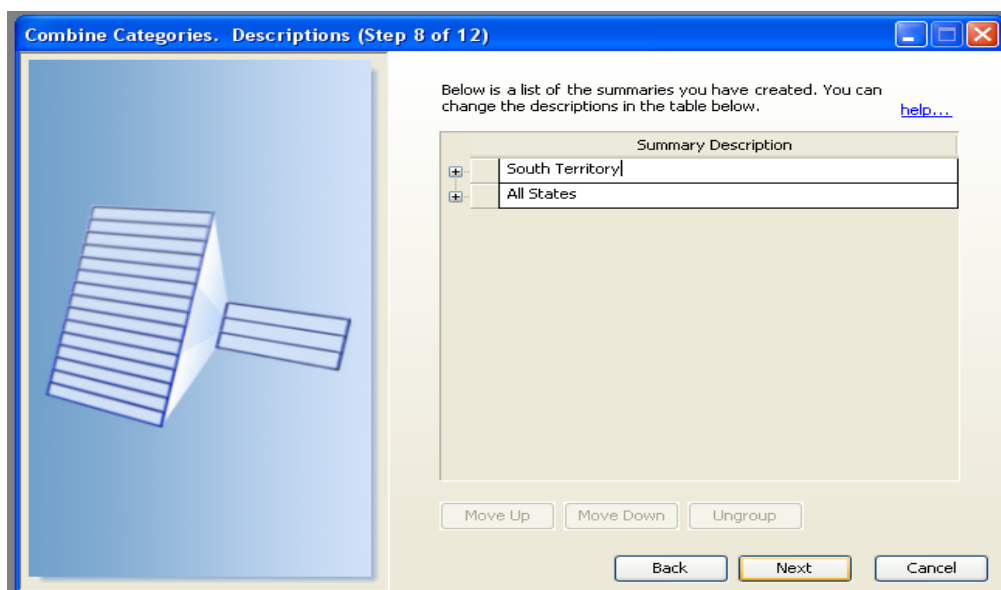
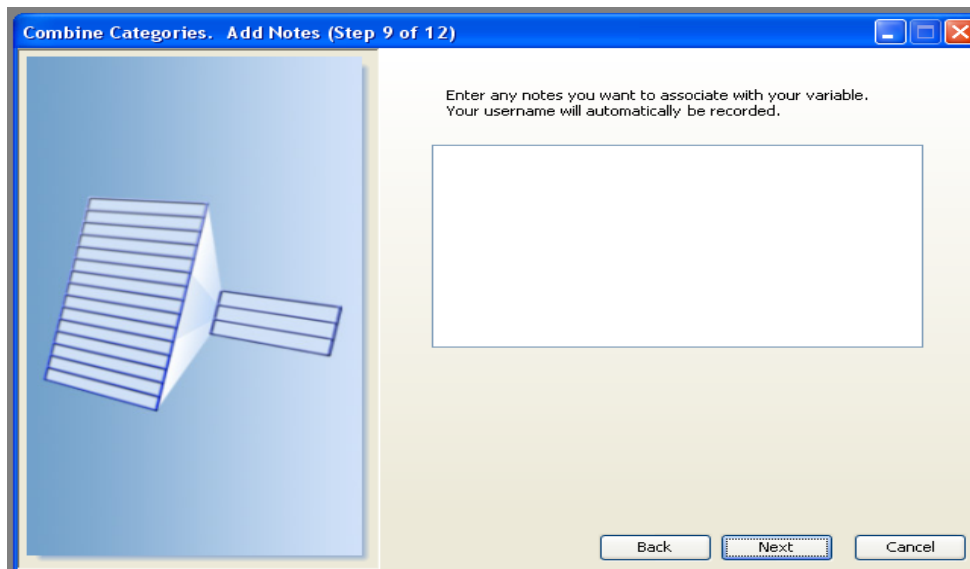o Following the example, 2 groups have been created with the defaul descroption below

• To change the Summary Description simply start to type in the field.

o Following the example, a South Territory group was created using: Louisiana, Oklahoma, New Mexico and Texas AND all other States are in the All States
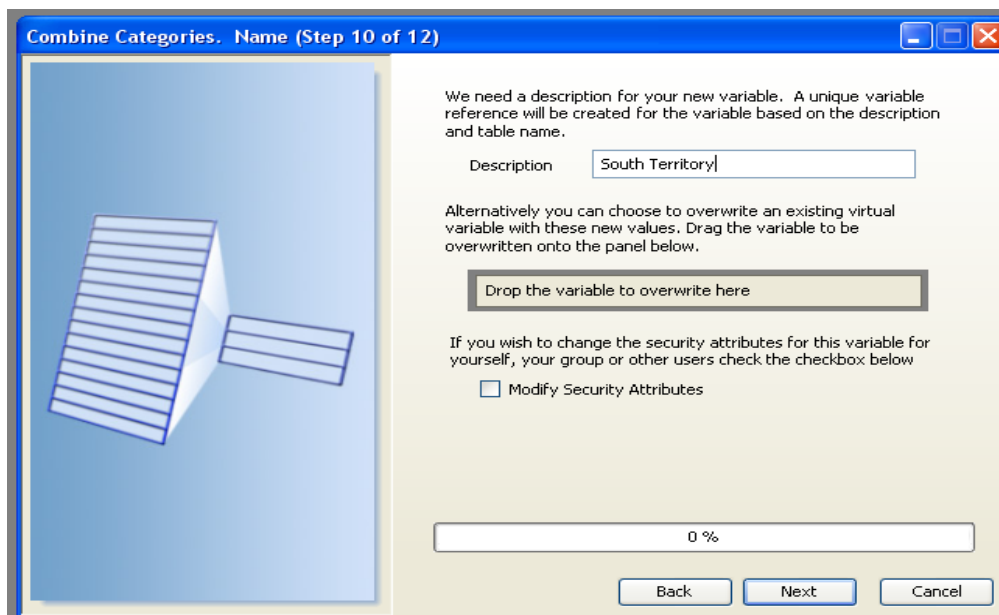
- You can then choose to add notes to your variable and these notes can be viewed later by right-clicking on the variable once it is in the System Explorer.
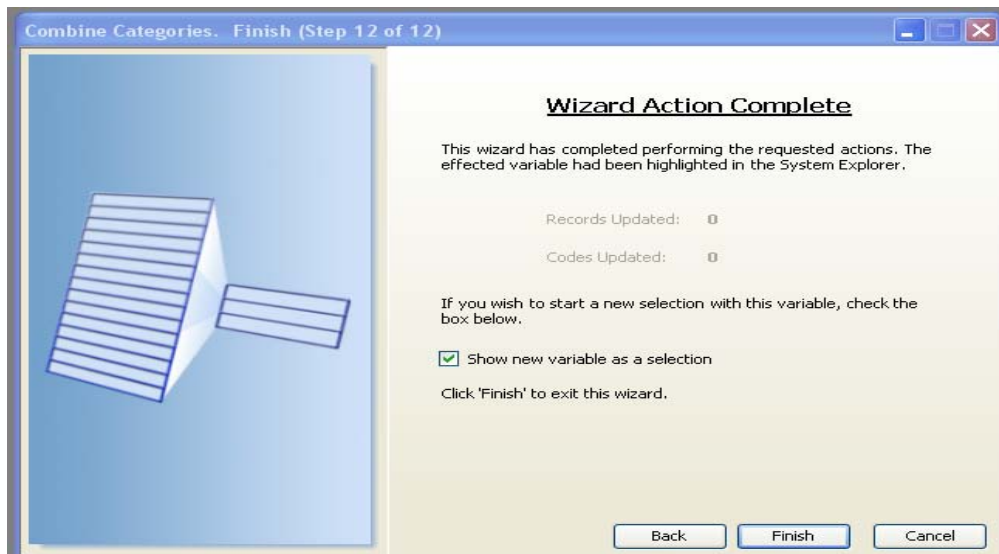

- You will need to enter a Description for your new variable.
  - Following the example, South Territory is the description in the field

- Wizard Action Complete is displayed once the wizard is completed. Check the box to open a new selection with this variable if required, and click 'Finish' to leave the wizard.

- Your new virtual variable is displayed on the left hand side in the System Explorer
  - See the new variable labeled South Territory below