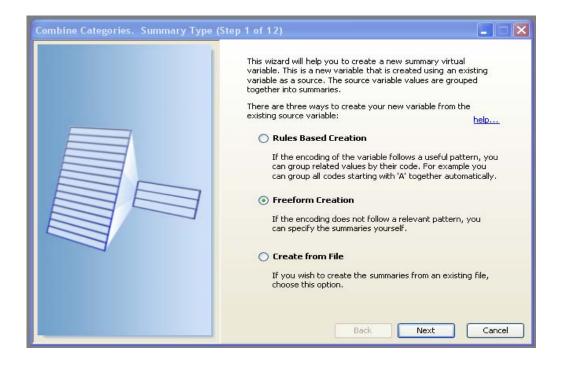


A Guide to Working with Combine Categories Wizard

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

Combine Categories. Source (Step 2 o	of 12)
	Please drag the source variable onto the panel below. The source variable must be a selector variable.
	Drop your source variable here
	Can't drop your variable here? Only certain types of selector variables can be dropped
	here. If you are trying to band a numeric variable, use the Numeric Variable Banding wizard instead.
	Back Next Cancel

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

Combine Categories. Freeform (Step 5	of 12)
	Select the values which make up each group, and click 'Create Summary Group' to group them together. <u>help</u>
	Code Description 📈
	US32 NEVADA
	US33 NEW HAMPSHIRE
	US34 NEW JERSEY
	US35 NEW MEXICO
	US36 NEW YORK
	US37 NORTH CAROLINA
	US38 NORTH DAKOTA
	US39 OHIO
	US40 OKLAHOMA
	US41 OREGON
	US42 PENNSYLVANIA
	US44 RHODE ISLAND
	US45 SOUTH CAROLINA
	Reset Create Summary Group
	Back Next Cancel



• Following the example, 2 groups have been created with the defaul descroption below

Combine Categories. Descrip	ons (Step 8 of 12)	
		<u>help</u>
	Summary Description	
	Description for group 1	
	Description for group 2	
	<u>_</u>	
		_
	Move Up Move Down Ungroup	
	Back	Cancel

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

Combine Categories, Descriptions (St	ep 8 of 12)
	Below is a list of the summaries you have created. You can help Summary Description South Territory All States Move Up Move Down Ungroup Back Next Cancel



• 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.

Combine Categories. Add Notes (Step	9 of 12)
	Enter any notes you want to associate with your variable. Your username will automatically be recorded.
	Back Next Cancel

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

Combine Categories. Name (Step 10 o	of 12) 📃 🗖 🔀
	We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name. Description South Territory Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwriten onto the panel below. Drop the variable to overwrite here If you wish to change the security attributes for this variable for yourself, your group or other users check the checkbox below Modify Security Attributes 0 % Back Next



• 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.

Combine Categories. Finish (Step 12 of 12)	
	Wizard Action Complete This wizard has completed performing the requested actions. The effected variable had been highlighted in the System Explorer.
	Records Updated: 0 Codes Updated: 0
	If you wish to start a new selection with this variable, check the box below.
	Show new variable as a selection
	Click 'Finish' to exit this wizard.
	Back Finish Cancel

Your new virtual variable is displayed on the left hand side in the System Explorer

 See the new variable labeled South Territory below

Syst	em Explorer 🥵
A 🚍	₽∃ ==∃
Descrip	tion
	🧱 Family Update Date
	📝 Hierarchy Code
🖓 ն	🗋 Site
	123 Unique Site
	ID Duns Number
	ABC Business Name
	AB _C Tradestyle
	ABC Second Tradestyle
	As National Identification Numbe
	Ceography
	🖃 💽 US City
	- E 🔽 State
	South Territory
	As _c Country Name
	As _c State Name
	- County - State - Province
	Continent
	As County Name
	R MSA
	🐼 MSA Metro-Micro Indicator
	· ·
	 As_c Physical Street Address Lin As_c Physical City
	🐴 Physical City