



Summary Type Example Screenshots

The following sections walk you through the tasks for defining criteria and results, including summary types, for a sales order transaction search, with screenshots illustrating definitions and results pages for different summary types.

Click on the arrows to display the steps and screenshots for tasks:

To create a search and define search criteria:

1. Go to Reports > Saved Searches > All Saved Searches > New and select Transaction.
2. Select Type from the **Filter** field and in the popup, select Sales Order and click **Set**.
3. Select Main Line from the **Filter** field and in the popup, select No and click **Set**.



Standard Summary	
FILTER *	DESCRIPTION *
Type	is Sales Order
Main Line	is false
<input type="text"/>	

To define a Group summary type:


1. Click the **Results** subtab and add the following fields: **Amount, Name, Date**.
2. Select Group from the Summary Type dropdown for Name, in order to group transactions by Customer.

Columns • Drill Down Fields •	
<input type="button" value="Remove All"/> <input type="button" value="Add Multiple"/>	
FIELD *	SUMMARY TYPE
Amount	
Name	Group
Date	





3. Click the **Preview** button. The first level of results simply lists customers.

	
Return To Criteria	
	
NAME ▲	
- None -	
10	Silingrova, Jana
2	Acme Inc.
3	ABC Co.
4	Widgets Inc.
5	Widgets Inc.
6	Computers Inc.
7	Great Falls Emergency Clinic : Project 1
8	Queen Industries
A	Company 4OL
AAA	Top Level - USD
AAA	Top Level - USD : AAA Sub - GBP
	Aaron Rosewall-Godley
	ABC Medical Supplies
	ABC Medical Supplies : ABC Office Expansion
	ABC Medical Supplies : FBM Project
	ABC Medical Supplies : Office Expansion Project Template
	Abdullah Bhupathiraju

- Click a customer name to drill down into a list of transactions for that customer.

 **Custom Transaction Search 3: ABC Medical Supplies Results**

[Return To Summary](#)





 Edit

EDIT VIEW	AMOUNT	NAME	DATE ▲	TAX PERIOD	TYPE
Edit View	80.36	ABC Medical Supplies : Office Expansion Project Template	10/22/2007		Sales Order
Edit View	4.02	Idaho State Tax Commission	10/22/2007		Sales Order
Edit View	50.00	ABC Medical Supplies	5/1/2008		Sales Order

To define a Sum summary type:


1. Click **Return to Summary**, then click **Return to Criteria**.
2. Click the **Results** subtab and select Sum from the Summary Type dropdown for Amount.

Columns • **Drill Down Fields •**






[Remove All](#) [Add Multiple](#)

FIELD *	SUMMARY TYPE
Amount	Sum
Name	Group
Date	

3. Click **Preview**. The results page displays a total dollar amount of transactions for each customer.

 **Custom Transaction Search 3: Results**

[Return To Criteria](#)

   |  

	SUM OF AMOUNT	NAME ▲
	-24.00	- None -
	249.37	10 Silingrova, Jana
	5,695.50	2 Acme Inc.
	166.50	3 ABC Co.
	33.00	4 Widgets Inc.
	545.00	5 Widgets Inc.
	666.00	6 Computers Inc.
	14,000.00	7 Great Falls Emergency Clinic : Project 1
	1,558.36	8 Queen Industries
	330.00	A Company 4OL
	240.00	AAA Top Level - USD
	360.00	AAA Top Level - USD : AAA Sub - GBP

To define a Count summary type:


1. Click **Return to Criteria**.
2. Click the **Results** subtab, add the Item field, and select Count from the Summary Type for Item. Also, remove the Sum from Amount, by selecting a blank from the Summary Type dropdown.

Columns • **Drill Down Fields •**

[Remove All](#) [Add Multiple](#)




FIELD *	SUMMARY TYPE
Item	Count
Amount	
Name	Group
Date	



3. Click **Preview**. The results page lists a count of the number of items sold for each customer.



Custom Transaction Search 3: Results


[Return To Criteria](#)









COUNT OF ITEM	NAME ▲
5	- None -
1	10 Silingrova, Jana
7	2 Acme Inc.
1	3 ABC Co.
1	4 Widgets Inc.
1	5 Widgets Inc.
1	6 Computers Inc.
1	7 Great Falls Emergency Clinic : Project 1
4	8 Queen Industries
4	A Company 4OL
2	AAA Top Level - USD
1	AAA Top Level - USD : AAA Sub - GBP
11	Aaron Rosewall-Godley
11	ABC Medical Supplies

4. Click a customer to drill down to a list of transactions and items.

 **Custom Transaction Search 3: ABC Medical Supplies Results**

[Return To Summary](#)

   |  | Edit 

EDIT VIEW	ITEM	AMOUNT	NAME	DATE ▲
Edit View	A2 Cable	80.36	ABC Medical Supplies : Office Expansion Project Template	10/22/2007
Edit View	Idaho	4.02	Idaho State Tax Commission	10/22/2007
Edit View	Test Kit/Package Item w/bins	50.00	ABC Medical Supplies	5/1/2008
Edit View	Idaho	2.50	Idaho State Tax Commission	5/1/2008
Edit View	Furniture Delivery and Installation	7,000.00	ABC Medical Supplies : ABC Office Expansion	10/3/2008

To define a Minimum summary type:


1. Click **Return to Summary**, then click **Return to Criteria**.
2. Click the **Results** subtab, remove the **Item** field, and select Minimum from the Summary Type dropdown for Amount.

Columns • **Drill Down Fields •**






[Remove All](#) [Add Multiple](#)

FIELD *	SUMMARY TYPE
Amount	Minimum
Name	Group
Date	

3. Click the **Preview** button. The results page displays the minimum transaction amount for each customer.

 **Custom Transaction Search 3: Results**

[Return To Criteria](#)

MINIMUM OF AMOUNT	NAME ▲
-7.00	- None -
249.37	10 Silingrova, Jana
-7.00	2 Acme Inc.
166.50	3 ABC Co.
33.00	4 Widgets Inc.
545.00	5 Widgets Inc.
666.00	6 Computers Inc.
7,000.00	7 Great Falls Emergency Clinic : Project 1
0.00	8 Queen Industries
0.00	A Company 4OL
60.00	AAA Top Level - USD
180.00	AAA Top Level - USD : AAA Sub - GBP
-9.00	Aaron Rosewall-Godley
0.00	ABC Medical Supplies

To define a Maximum summary type:


1. Click **Return to Criteria**.
2. Click the **Results** subtab, and select Maximum from the Summary Type dropdown for Amount.

Columns • **Drill Down Fields •**






[Remove All](#) [Add Multiple](#)

FIELD *	SUMMARY TYPE
Amount	Maximum
Name	Group
Date	

3. Click the **Preview** button. The results page displays the maximum transaction amount for each customer.

 **Custom Transaction Search 3: Results**

[Return To Criteria](#)

MAXIMUM OF AMOUNT	NAME ▲
0.00	- None -
249.37	10 Silingrova, Jana
2,265.00	2 Acme Inc.
166.50	3 ABC Co.
33.00	4 Widgets Inc.
545.00	5 Widgets Inc.
666.00	6 Computers Inc.
7,000.00	7 Great Falls Emergency Clinic : Project 1
1,240.00	8 Queen Industries
130.00	A Company 4OL
180.00	AAA Top Level - USD
180.00	AAA Top Level - USD : AAA Sub - GBP
3,692.00	Aaron Rosewall-Godley
5,500.00	ABC Medical Supplies

To define an Average summary type:


1. Click **Return to Criteria**.
2. Click the **Results** subtab, and select Average from the Summary Type dropdown for Amount.

Columns • **Drill Down Fields •**

[Remove All](#) [Add Multiple](#)






FIELD *	SUMMARY TYPE
Amount	Average
Name	Group
Date	

3. Click the **Preview** button. The results page displays the average transaction amount for each customer.



Custom Transaction Search 3: Results

[Return To Criteria](#)

AVERAGE OF AMOUNT	NAME ▲
-0.30	- None -
249.37	10 Silingrova, Jana
813.64	2 Acme Inc.
166.50	3 ABC Co.
33.00	4 Widgets Inc.
545.00	5 Widgets Inc.
666.00	6 Computers Inc.
7,000.00	7 Great Falls Emergency Clinic : Project 1
389.59	8 Queen Industries
82.50	A Company 4OL
120.00	AAA Top Level - USD
180.00	AAA Top Level - USD : AAA Sub - GBP
354.92	Aaron Rosewall-Godley
1,422.25	ABC Medical Supplies
7,000.00	ABC Medical Supplies : ABC Office Expansion
100.00	ABC Medical Supplies : FBM Project

Related Topics

[Defining Search Results Display Options](#)
[Summary Types for Search Results](#)
[Summary Type Descriptions](#)

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