

Fast•Class File

SmartOffice

Volume 50: Grouping and Sorting Summary Records

Sorting Summary Screen Data

Summary screen data can be sorted in ascending or descending fashion by clicking on the column header of the column containing the data that the sort will be based on. The first click will sort the data in ascending fashion; the second click will sort the data in descending fashion.

For example, to sort a collection of contact records in ascending fashion by source, ensure that the **Source** column is on display and click the **Source** column header.

Individual Contact Summary

+ [Icons]

Summary | Contact (P) | Add'l Personal | Household (Z) | **Key Relations** | Benefit | Asset Allocation (X) | Letters/Documents | >>

Contact Name	Type	Source ↑	Occupation	DOB	All E-mail Addresses
<input type="checkbox"/> Antosen, Robert C.	Prospect	Referral	Real Estate	07/25/1976	
<input type="checkbox"/> Arron, John S.	Prospect	Referral	Manufacturing	10/16/1952	john@yahoo.com johndemo@yahoo.com
<input type="checkbox"/> Baronoy, Alexi	Prospect	Referral		01/30/1980	alexii@iol.com
<input type="checkbox"/> Blackson, Andrew	Prospect	Referral	Media		
<input type="checkbox"/> Johnson, Kelly J	Prospect	Referral	Underwriter	11/15/1965	
<input type="checkbox"/> Thompson, Kevin	Prospect	Referral	Marketing	04/17/1969	
<input type="checkbox"/> Abernathy, Brad	Prospect	Seminar	Insurance	03/19/1963	ezmailtest@ez-data.com
<input type="checkbox"/> Atable, Patty V	Prospect	Seminar		02/05/1971	
<input type="checkbox"/> Castillo, Lynn	Prospect	Seminar		02/23/1977	
<input type="checkbox"/> Chevalier, Henry	Prospect	Seminar	Advisor	01/30/1947	henry@cediff.com
<input type="checkbox"/> Fredricks, Lawrence H.	Prospect	Seminar	Manufacturing	08/01/1951	
<input type="checkbox"/> Hammond, Cheryl	Prospect	Seminar	Manager	03/27/1965	
<input type="checkbox"/> Proby, Martin James	Prospect	Seminar	Clerical	08/11/1958	mproby@eol.com
<input type="checkbox"/> Smith, Jane	Prospect	Seminar	Administrative Assistant	09/22/1970	
<input type="checkbox"/> Tipton, Benjamin	Prospect	Seminar		11/08/1973	benjamin@coldmail.com
<input type="checkbox"/> March, Rafael	Prospect	Web Site		11/05/1978	

Records Shown: 19 Total Records: 19

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Figure 1: Individual Contact Summary sorted in ascending fashion by source.

Sorting and Grouping Summary Screen Data

Records in a summary screen can be sorted and grouped using the **Change Sorting** tool.

To Sort and Group Data –

- Move cursor over the **Customize Spreadsheet Layout** button in the summary screen toolbar. **Important:** *Do not click* on the **Customize Spreadsheet Layout** button – the **Change Sorting** box will appear automatically.
- Select a sorting option in the **Change Sorting** box.

Note: Any sort option in the Change Sorting box can be used to sort data even if the corresponding column is not on display in the summary screen.



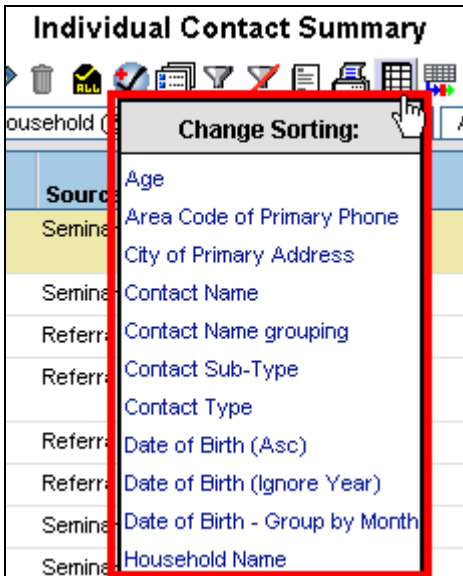


Figure 2: The Change Sorting box attached to the Customize Spreadsheet Layout button.

- After selecting a sort option, the summary screen will be reloaded based on sort selection. Data in the summary screen will also be grouped together based on sort selection.

Contact Name	Type	Source	Occupation	DOB	All E-mail Addresses
Source - Referral					
<input type="checkbox"/> Antosen, Robert C.	Prospect	Referral	Real Estate	07/25/1976	
<input type="checkbox"/> Arron, John S.	Prospect	Referral	Manufacturing	10/16/1952	john@yahoo.com johndemo@yahoo.com
<input type="checkbox"/> Baronoy, Alexi	Prospect	Referral		01/30/1980	alexii@iol.com
<input type="checkbox"/> Blackson, Andrew	Prospect	Referral	Media		
<input type="checkbox"/> Johnson, Kelly J	Prospect	Referral	Underwriter	11/15/1965	
<input type="checkbox"/> Thompson, Kevin	Prospect	Referral	Marketing	04/17/1969	
Subtotal: Source - Referral (6)					
Source - Seminar					
<input type="checkbox"/> Abernathy, Brad	Prospect	Seminar	Insurance	03/19/1963	ezmailtest@ez-data.com
<input type="checkbox"/> Afable, Patty V	Prospect	Seminar		02/05/1971	
<input type="checkbox"/> Castillo, Lynn	Prospect	Seminar		02/23/1977	
<input type="checkbox"/> Chevalier, Henry	Prospect	Seminar	Advisor	01/30/1947	henry@cediff.com
<input type="checkbox"/> Fredricks, Lawrence H.	Prospect	Seminar	Manufacturing	08/01/1951	
<input type="checkbox"/> Hammond, Cheryl	Prospect	Seminar	Manager	03/27/1965	
Records Shown: 19 Total Records: 19					

Figure 3: Summary data sorted and grouped.

- Grouped data will include a heading indicating the nature of the grouping, records alphabetized based on contact name, and a sub-total of records in a grouping.

Sorting data using the **Change Sorting** box will also add a **Display Pie Chart** button to the summary toolbar.

To Add a Pie Chart to Sorted and Grouped Data –

- Click the **Display Pie Chart** button in the toolbar of a summary screen that has been sorted and grouped.

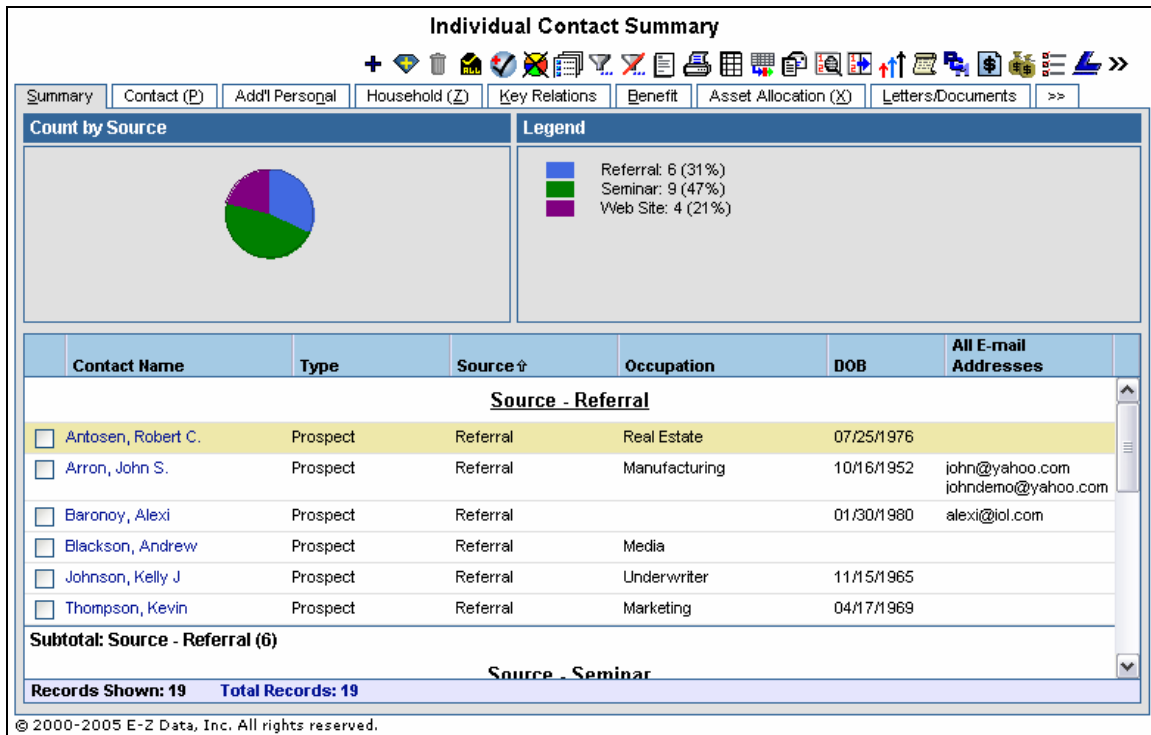


Figure 4: Pie chart added to sorted and grouped data.

If summary data is resorted using the **Change Sorting** box while a pie chart is on display, the pie chart will be reloaded based on the newly selected sort.

Saving a Sort Selection for Future Searches

Both the column header sort option and the sort options available in the **Change Sorting** box create temporary sorts. The sorting will not be saved when a new screen is viewed.

However, it is possible to save a sort selection for future searches.

To Save a Sort Selection –

- Click the **Customize Spreadsheet Layout** button in the summary toolbar.
- Click the **Sort By** drop-down in the **Spreadsheet Customization** utility.

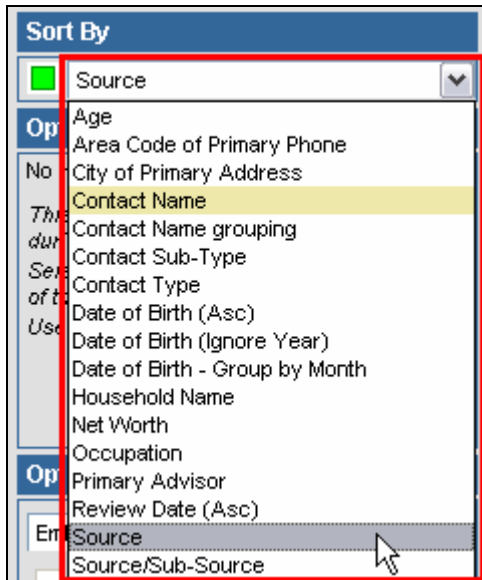


Figure 5: The Sort By drop-down in the Spreadsheet Customization utility.

The options available in the **Sort By** drop-down match the options available in the **Change Sorting** box. When an option is selected in the **Sort By** drop-down, summary data will be sorted and grouped based on sort selection. The selection will also be saved for future searches.

- Select a sort option.
- Click **OK**.
- Select a save option.
- The summary screen will be reloaded based on sort selection.

*Important: Saved sorts will only apply to searches based on the same kind of data on display in the summary screen that has been customized. For example, if the **Individual Contact Summary** screen has been customized with a sort, an **Individual and Business Contact Summary** screen will not be displayed based on the same sort.*