

Q - Can I copy a formula for one calculation field to another?

A - Yes. To save time and effort when creating several calculated fields with similar formulas, copy a formula from one calculated field to another by:

1. From the formula box, select the formula to be copied by dragging the mouse cursor over the formula text.
2. Press Control-C to copy the selected formula to the clipboard.
3. Exit from the formula box and either create or select the target calculated field.
4. At the formula box for the target calculated field, press Control-V to paste the copied formula to the new calculated field.
5. Make minor edits as necessary to apply to the new calculated field.

Q - How do I sum a column of numbers to get a grand total in Approach?

A - You can quickly create a grand total of a column of numbers in Approach by:

1. From the Create menu, choose Create Report
2. Select Columnar and choose the fields to add to the report. Be sure to include the numeric field you want to grand total. Click Done once you've added the desired fields.
3. If necessary switch to Design and make sure Show Data under the View menu is checked. Then, click in the column to be summed so that it is selected.
4. Then click the summation icon on the tool bar (1+2=3).
5. Approach will automatically place a grand total of the selected column at the end of the report.

Q - How do I create a subtotal in Approach? For example, I want a subtotal of amount by salesrep. Each salesrep has one or more records with an amount field?

A - To produce a quick subtotal report, use the Approach Powerclick reporting feature.

1. From the Create menu, choose Create Report
- 2.. Select Columnar and choose the fields to add to the report. Be sure to include the field to group the records by (e.g., Salesrep) and the numeric field to subtotal (e.g., Amount). Click Done once you've added the desired fields.
3. If necessary switch to Design and make sure Show Data under the View menu is checked. Click in the field you want to group by -- Salesrep in this example.
4. Click the trailing summary icon. It is just to the right of the icon with the letter i on it. Approach will automatically group the records by Salesrep.
5. Click in the Amount field so that the entire column is selected.
6. Click the summation icon (1+2=3) on the tool bar.

Approach automatically adds a subtotal field at the end of each grouping by Salesrep.