

*Wizards: Transaction Summary
- Min-Max range*

2018 Q4

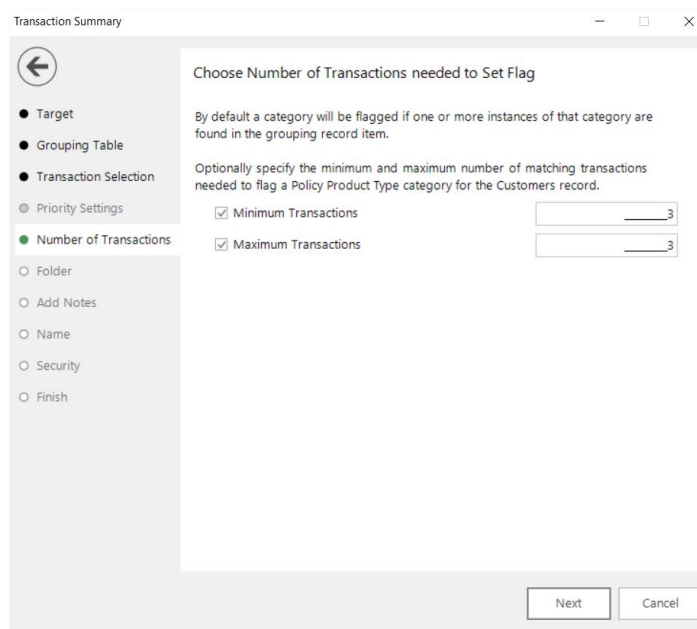
Summary

The Transaction Summary Wizard now allows you to specify a minimum / maximum number of transactions that should be present for a record to be flagged for inclusion in creating a virtual variable

The Transaction Summary Wizard takes a selector variable on the transaction table (e.g. Policies - Policy Product Type) and creates a flag array virtual variable on the grouping table (e.g. Customers or Records).

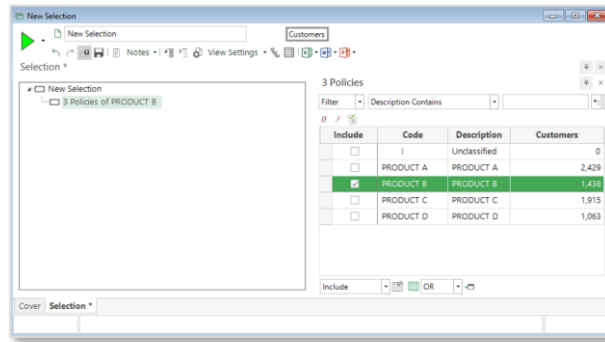
The introduction of a minimum / maximum transaction range allows you to optionally specify and determine that a record should only be flagged if it falls within the defined range. For example, People must have purchased particular Policies exactly 3 times to be selected on a 'yes' flag.

The new functionality is accessed at the **Number of Transactions** step:



- Set both the Minimum and Maximum Transactions to 3

Once the steps of the wizard are complete, the result is a virtual variable that identifies Customers who have exactly 3 Policies of a particular type:



The screenshot above shows a selection of the 1438 customers who have purchased Product B exactly 3 times.

Use the data grid aggregation options to verify the result:

Data Grid

Grid	
Drag a column header here to group by that column.	
Client Reference Number	Policy Product Type (List Distinct)
134668	PRODUCT B(3);PRODUCT C(2);PROD...
142640	PRODUCT C(4);PRODUCT B(3);PROD...
144443	PRODUCT B(3)
147046	PRODUCT B(3);PRODUCT A(2)
151236	PRODUCT B(3);PRODUCT A(3);PROD...
166309	PRODUCT B(3);PRODUCT D(2);PROD...
181998	PRODUCT A(5);PRODUCT B(3);PROD...
192687	PRODUCT B(3);PRODUCT D
240364	PRODUCT C(3);PRODUCT B(3);PROD...
245634	PRODUCT B(3);PRODUCT C(2);PROD...
249428	PRODUCT C(3);PRODUCT B(3);PROD...
261027	PRODUCT C(4);PRODUCT A(3);PROD...

For each of the selected records, whilst a customer may have policies of other product types, here they meet the selection criteria as a result of having purchased 3 Policy Product Bs.

Note:

Rather than using all Policies, at the **Transaction Selection** step of the wizard, you can apply a selection that identifies specific transactions.