

How do I Create Periods Using the 'Group by' Function?

- 2023-11-30 - Comments (0) - Lasetnet FO Connector FAQs

Lasernet for Dynamics 365

Users may wish a report to display different time periods. This article will explain how to use the **Group by** and **Sum** functions to create a report with different time periods. The customer period report may look as follows:

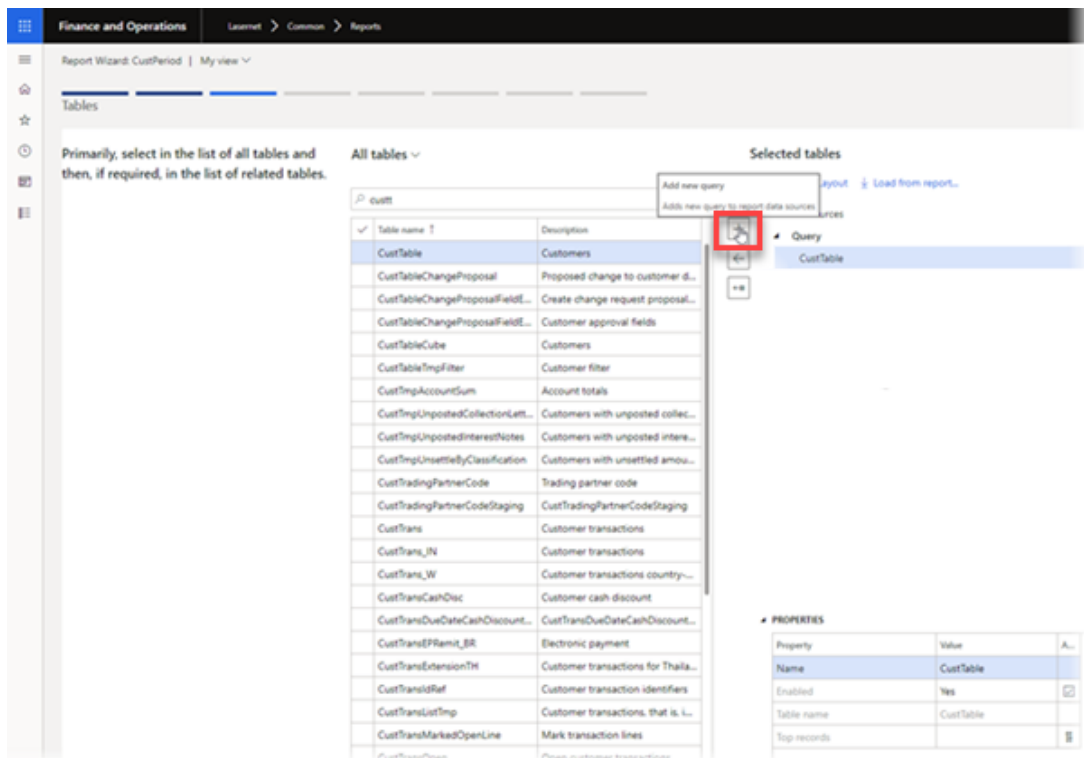
Customer period report					
					Report date: 22. march 2021
Account	Name	Period 20.02.2021 - 22.03.2021	Period 21.01.2021 - 19.02.2021	Period 22.12.2020 - 20.01.2021	Period before and until 21.12.2020
DE-001	Contoso Europe				0,00
US-001	Contoso Retail San Diego		-117.460,20	5.362,50	7.666,77
US-003	Forest Wholesales	0,00			68.274,94

Follow these steps:

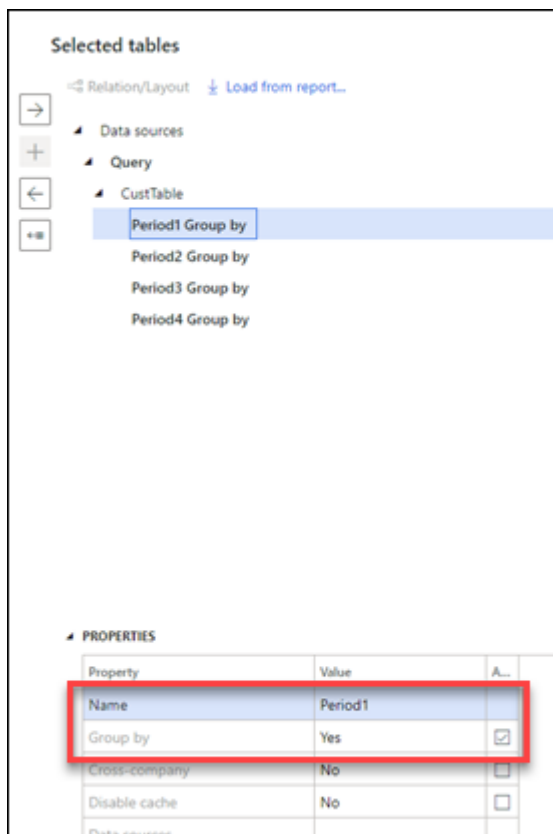
1. Create a new query report, then click **Setup > Query wizard**.



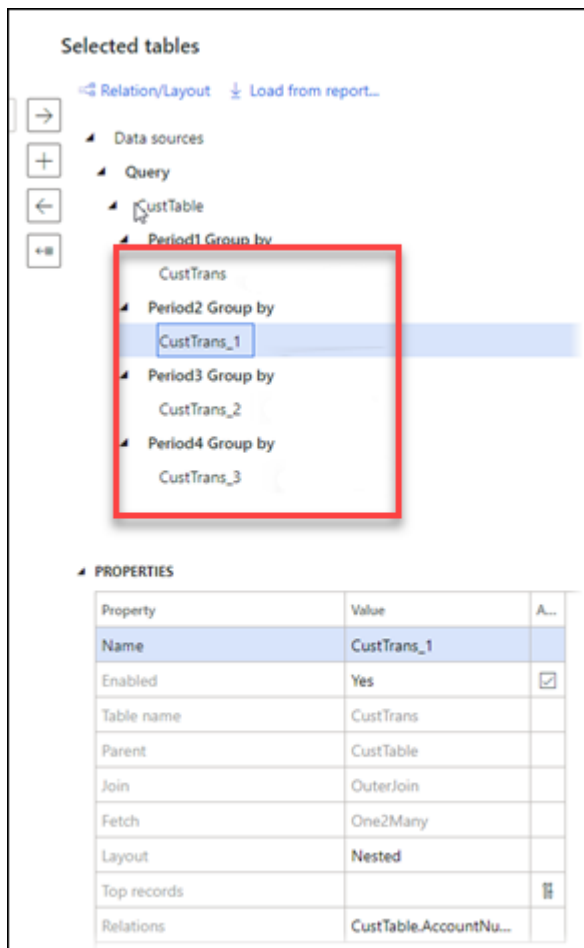
2. Navigate to **Tables**, then add the **CustTable** table and four new queries using the + sign.



3. Give the new query a name and set **Group by=Yes** for all four new queries.



4. Add **CustTrans** to the new queries.



5. Under the tab for Selected fields, remove the **Recid (Group by)** fields from the CustTrans tables to avoid getting the data group by every transaction/record.

6. Add **AccountNum** and **AmountMST** to all CustTrans tables.

Set it up as follows:

AccountNum: Group by

This will group the CustTable records by AccountNum.

AmountMST: Sum

This will calculate the sum of field AmountMST for all records with the same AccountNum.

Selected fields

↓ Load from report...

▲ CustTable

RecId

AccountNum

name()

▲ CustTrans

AccountNum (Group by)

AmountMST (Sum)

▲ CustTrans_1

AccountNum (Group by)

AmountMST (Sum)

▲ CustTrans_2

AccountNum (Group by)

AmountMST (Sum)

▲ CustTrans_3

AccountNum (Group by)

AmountMST (Sum)

▲ PROPERTIES

Property	Value	Action
Label	Amount	⌵ ↺
Group by function	Sum	

7. Navigate to the Default ranges page and add the field **TransDate** to all CustTrans tables.

8. Define the different time periods by clicking the **Expression Editor** button to change the value in the properties for each field to the following:

CustTrans: (today () - 30) + ".." + today ()

CustTrans_1: (today () - 60) + ".." + today () - **31**

CustTrans_2: (today () - 90) + ".." + today () - **61**

CustTrans_3: ".." + today () - **91**

Default ranges

▲ CustTable

▲ CustTrans

TransDate (Range=(today ()-30)+..+ today ())

▲ CustTrans_1

TransDate (Range=(today ()-60)+..+ today ()-31)

▲ CustTrans_2

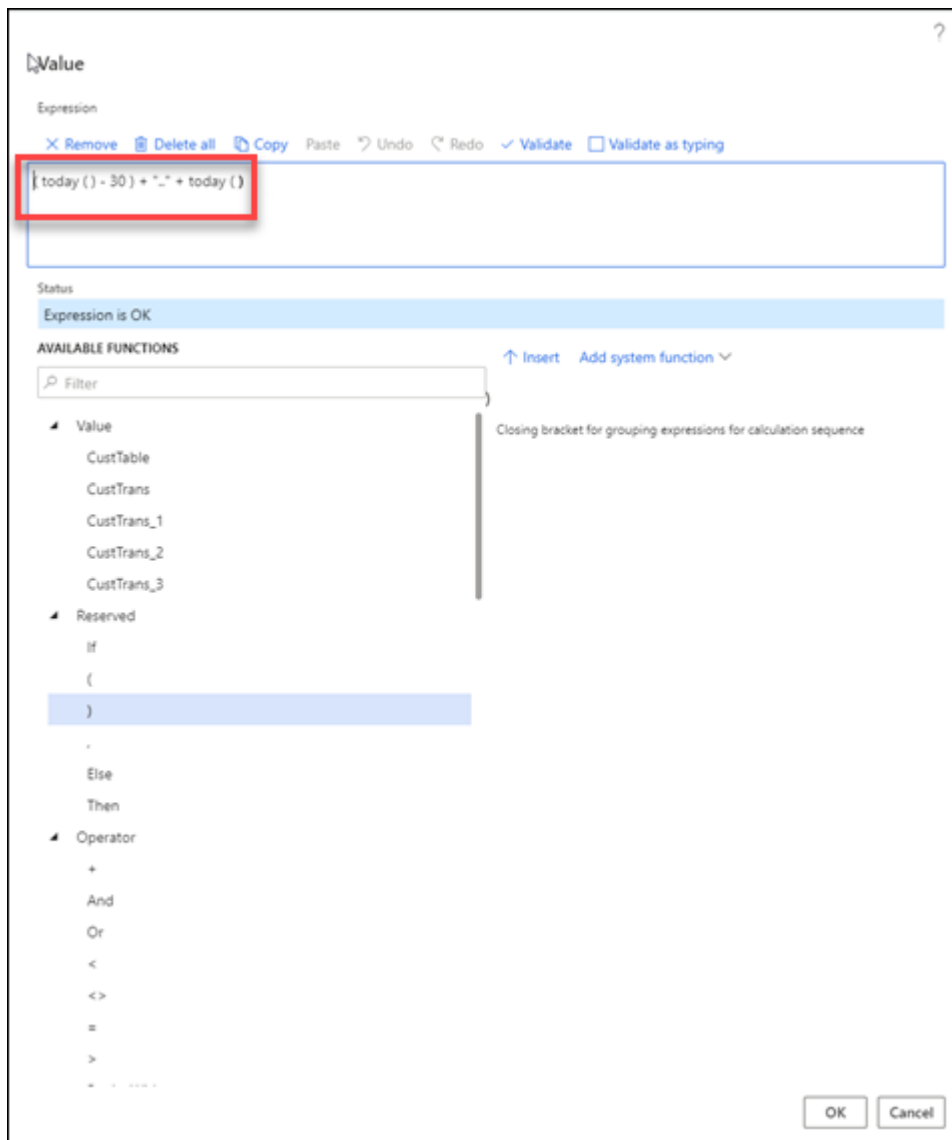
TransDate (Range=(today ()-90)+..+ today ()-61)

▲ CustTrans_3

TransDate (Filter=..+ today ()-91)

▲ PROPERTIES

Property	Value	A...
Visible	Yes	<input checked="" type="checkbox"/>
Read-only	Yes	<input checked="" type="checkbox"/>
Filter	No	<input type="checkbox"/>
Value	(today ()-30)+..+ toda...	<input checked="" type="checkbox"/>



For more information on this topic, read our [Lasernet FO Connector User Guide](#).