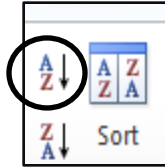


Excel Intermediate

Custom Sorting and Subtotaling

Excel allows us to sort data whether it is alphabetic or numeric. Simply clicking within a column or row of data will begin the process.

- Click in the name column of our Range of Data. (Do not highlight the column)
- Click on the Data Tab in the Ribbon



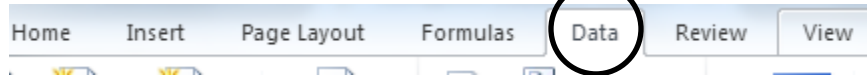
- Click on A – Z in the sort and filter group to see the donor names alphabetically sorted A - Z
- Click on Z – A in the sort and filter group to see the donor names alphabetically sorted Z - A.

A column containing numbers will be sorted smallest to largest and largest to smallest when choosing A – Z and Z – A, respectively.

Custom Sorting by Level

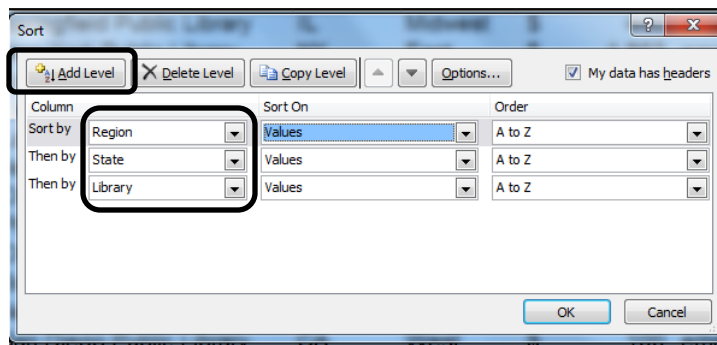
Custom Sorting allows you to select multiple criteria to sort your data.

- Click anywhere inside your range of data
- Click on the Data Tab



Click on the Sort Box. This brings up the Sort dialog box allowing you to sort your data by level. Clicking on the downward arrow in the “Sort by” field will bring up the criteria to choose from.

- Choose **Region** as your first sort level.
- Click on Add Level at the top left of the dialog box and select **State**.
- Click on Add Level again and select **Library**.
- Click on add Level once more and select **Giving Total**.
- Click on ok.



Your resulting spreadsheet should look like this:

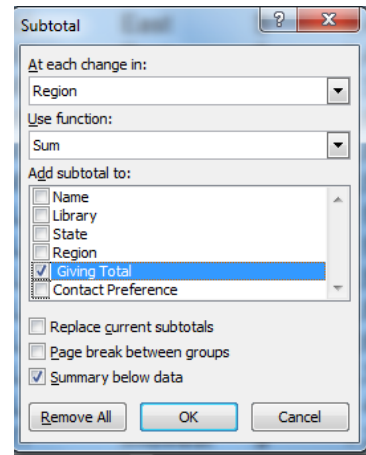
	A	B	C	D	E	F
3	Name	Library	State	Region	Giving Total	Contact Preference
4	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119	email
5	Trump, Donald	New Jersey Public Library	NJ	East	\$ 1,444	email
6	Fallon, Jimmy	Brooklyn Public Library	NY	East	\$ 1,456	email
7	Clinton, Hillary	New York Public Library	NY	East	\$ 351	email
8	Pitt, Brad	New York Public Library	NY	East	\$ 1,614	phone
9	Patterson, James	New York Public Library	NY	East	\$ 1,863	email
10	Williams, Brian	New York Public Library	NY	East	\$ 3,536	email
11	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
12	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
13	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone

The data should be sorted first alphabetically by Region. Within each region it should be sorted alphabetically by State. Within each state it should be sorted alphabetically by Library and within each Library, The Giving Totals should be listed smallest to largest.

Subtotaling

After sorting your data you may want to add subtotals. This option is available within the Data Tab as well.

- Select any cell inside your range of data
- Click on subtotal in the Outline Group (way over to the right), to bring up the Subtotal dialog box. Clicking on the downward arrows next to each field, select:
- At each change in: **Region**
- Use the function: **Sum**
- Add subtotal to: **Giving Total**
- Check the box that says Summary below data
- Click on ok



The resulting spreadsheet should look like this:

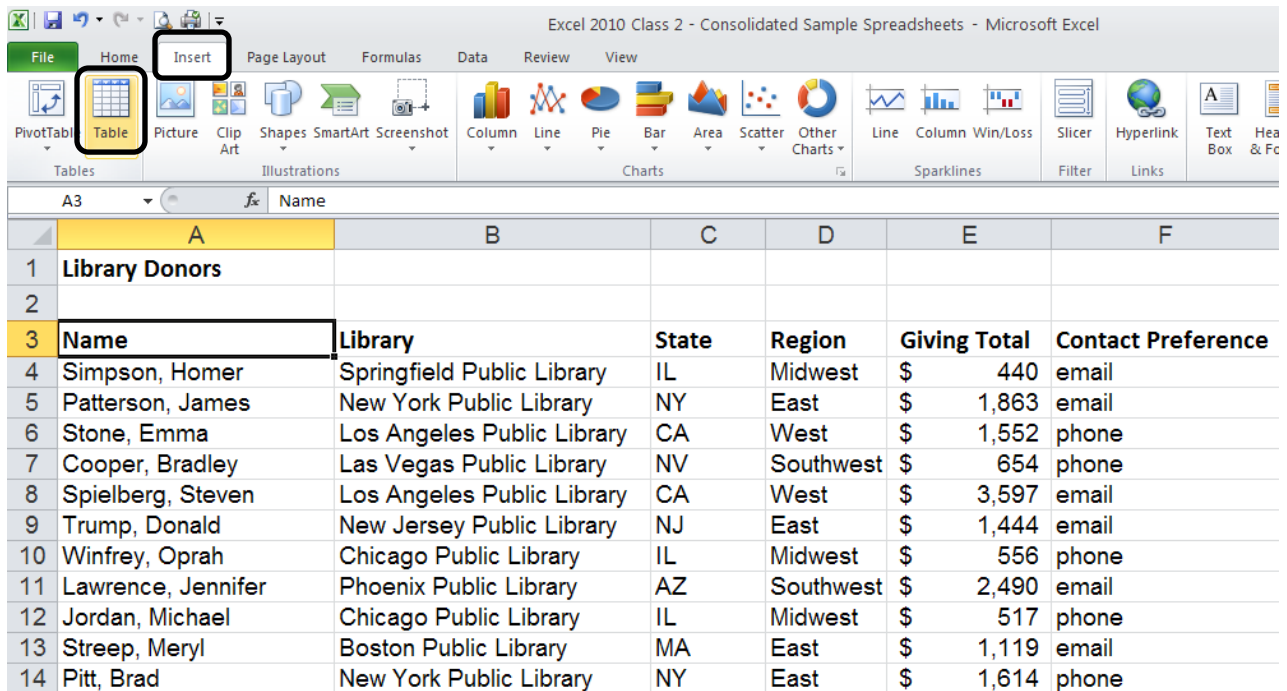
	A	B	C	D	E	F
	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119	email
	Trump, Donald	New Jersey Public Library	NJ	East	\$ 1,444	email
	Fallon, Jimmy	Brooklyn Public Library	NY	East	\$ 1,456	email
	Clinton, Hillary	New York Public Library	NY	East	\$ 351	email
	Pitt, Brad	New York Public Library	NY	East	\$ 1,614	phone
	Patterson, James	New York Public Library	NY	East	\$ 1,863	email
	Williams, Brian	New York Public Library	NY	East	\$ 3,536	email
				East Total	\$ 11,383	
	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone
	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873	email
	Murray, Bill	Chicago Public Library	IL	Midwest	\$ 2,640	email
	Potter, Harry	Palatine Public Library	IL	Midwest	\$ 1,376	owl
	Simpson, Homer	Springfield Public Library	IL	Midwest	\$ 440	email
	Cooney, George	Lexington Public Library	KY	Midwest	\$ 1,200	phone

We can add more subtotals by simply clicking on the Subtotal icon again, and changing region to state for instance. Just make sure the box next to: "Replace current subtotals" is not checked.

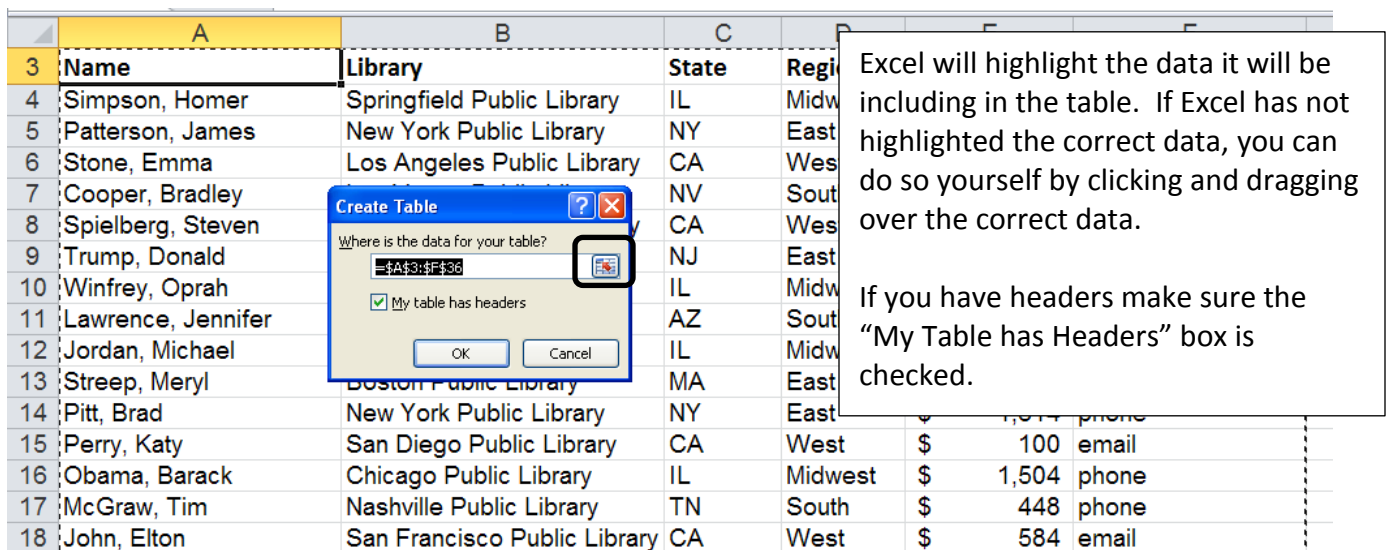
Creating a Table

Tables are a great way to organize your data and make it easier to sort and filter information.

Select any cell within your data set, select the Insert Ribbon, then click on "Table."



	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact Preference
4	Simpson, Homer	Springfield Public Library	IL	Midwest	\$ 440	email
5	Patterson, James	New York Public Library	NY	East	\$ 1,863	email
6	Stone, Emma	Los Angeles Public Library	CA	West	\$ 1,552	phone
7	Cooper, Bradley	Las Vegas Public Library	NV	Southwest	\$ 654	phone
8	Spielberg, Steven	Los Angeles Public Library	CA	West	\$ 3,597	email
9	Trump, Donald	New Jersey Public Library	NJ	East	\$ 1,444	email
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
11	Lawrence, Jennifer	Phoenix Public Library	AZ	Southwest	\$ 2,490	email
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
13	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119	email
14	Pitt, Brad	New York Public Library	NY	East	\$ 1,614	phone



	A	B	C	D	E	F
3	Name	Library	State	Region		
4	Simpson, Homer	Springfield Public Library	IL	Midw		
5	Patterson, James	New York Public Library	NY	East		
6	Stone, Emma	Los Angeles Public Library	CA	Wes		
7	Cooper, Bradley		NV	Sout		
8	Spielberg, Steven		CA	Wes		
9	Trump, Donald		NJ	East		
10	Winfrey, Oprah		IL	Midw		
11	Lawrence, Jennifer		AZ	Sout		
12	Jordan, Michael		IL	Midw		
13	Streep, Meryl	Boston Public Library	MA	East		
14	Pitt, Brad	New York Public Library	NY	East		
15	Perry, Katy	San Diego Public Library	CA	West	\$ 100	email
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone
17	McGraw, Tim	Nashville Public Library	TN	South	\$ 448	phone
18	John, Elton	San Francisco Public Library	CA	West	\$ 584	email

Excel will highlight the data it will be including in the table. If Excel has not highlighted the correct data, you can do so yourself by clicking and dragging over the correct data.

If you have headers make sure the "My Table has Headers" box is checked.

You now have a new Ribbon titled "Table Tools - Design." This Ribbon allows you to change the color coding of your table. By selecting "Banded Rows" the table will color every other row a

different color for easier viewing. You can also select “Banded Columns” to do the same to your columns.

Table Name: Table1

Table Tools: Design

Table Style Options: Banded Rows, Banded Columns

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact Preference
4	Simpson, Homer	Springfield Public Library	IL	Midwest	\$ 440	email
5	Patterson, James	New York Public Library	NY	East	\$ 1,863	email
6	Stone, Emma	Los Angeles Public Library	CA	West	\$ 1,552	phone
7	Cooper, Bradley	Las Vegas Public Library	NV	Southwest	\$ 654	phone
8	Spielberg, Steven	Los Angeles Public Library	CA	West	\$ 3,597	email
9	Trump, Donald	New Jersey Public Library	NJ	East	\$ 1,444	email
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
11	Lawrence, Jennifer	Phoenix Public Library	AZ	Southwest	\$ 2,490	email
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
13	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119	email
14	Pitt, Brad	New York Public Library	NY	East	\$ 1,614	phone
15	Perry, Katy	San Diego Public Library	CA	West	\$ 100	email
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone

You will now see some drop-down arrows at the end of each of your column headings. Select the drop down arrow next to the “Name” Heading. You will see the options for sorting the column. You can choose to sort from A-Z or from Z-A.

Table Name: Table1

Table Tools: Design

Table Style Options: Banded Rows, Banded Columns

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact Preference
4	Sort A to Z	Springfield Public Library	IL	Midwest	\$ 440	email
5	Sort Z to A	New York Public Library	NY	East	\$ 1,863	email
6	Sort by Color	Los Angeles Public Library	CA	West	\$ 1,552	phone
7	Clear Filter From “Name”	Las Vegas Public Library	NV	Southwest	\$ 654	phone
8	Filter by Color	Los Angeles Public Library	CA	West	\$ 3,597	email
9	Text Filters	New Jersey Public Library	NJ	East	\$ 1,444	email
10	Search	Chicago Public Library	IL	Midwest	\$ 556	phone
11	(Select All)	Phoenix Public Library	AZ	Southwest	\$ 2,490	email
12	Carell, Steve	Chicago Public Library	IL	Midwest	\$ 517	phone
13	Clinton, Hillary	Boston Public Library	MA	East	\$ 1,119	email
14	Clooney, George	New York Public Library	NY	East	\$ 1,614	phone
15	Cooper, Bradley	San Diego Public Library	CA	West	\$ 100	email
16	Degeneres, Ellen	Chicago Public Library	IL	Midwest	\$ 1,504	phone
17	Ditka, Mike	Nashville Public Library	TN	South	\$ 448	phone
18	Fallon, Jimmy	San Francisco Public Library	CA	West	\$ 584	email
19	Gaga, Lady	Los Angeles Public Library	CA	West	\$ 3,597	email
20	Gates, Bill	Chicago Public Library	IL	Midwest	\$ 1,873	email

Sort A to Z

Sort Z to A

Sort by Color

Clear Filter From “Name”

Filter by Color

Text Filters

Search

(Select All)

Carell, Steve

Clinton, Hillary

Clooney, George

Cooper, Bradley

Degeneres, Ellen

Ditka, Mike

Fallon, Jimmy

Gaga, Lady

Gates, Bill

OK

Cancel

	A	B	C	D	E	
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact
4	Carell, Steve	San Francisco Public Library	CA	West	\$ 538	phone
5	Clinton, Hillary	New York Public Library	NY	East	\$ 351	email
6	Clooney, George	Lexington Public Libr		Midwest	\$ 1,200	phone
7	Cooper, Bradley	Las Vegas Public Lib		Southwest	\$ 654	phone
8	Degeneres, Ellen	Los Angeles Public L		West	\$ 2,037	phone
9	Ditka, Mike	Chicago Public Libra		Midwest	\$ 1,873	email
10	Fallon, Jimmy	Brooklyn Public Libra		West	\$ 1,456	email
11	Gaga, Lady	Los Angeles Public L		West	\$ 1,101	phone
12	Gates, Bill	Seattle Public Library		Northwest	\$ 1,488	email
13	Gosling, Ryan	Los Angeles Public Library	CA	West	\$ 1,176	email
14	John, Elton	San Francisco Public Library	CA	West	\$ 584	email
15	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
16	Keith, Toby	Houston Public Library	TX	Southwest	\$ 346	email
17	King, Stephen	Augusta Public Library	ME	Northeast	\$ 291	email

You will notice a little arrow indicating that this column has been sorted.

In addition to sorting, you can use Excel 2010 to filter out data from your table in order to leave just the data you need. For instance, in this example, you can filter out all library donors except those who donated to the Chicago Public Library:

	A	B	C	D	E	
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact
4	Simpson, Homer		IL	Midwest	\$ 440	email
5	Patterson, James		NY	East	\$ 1,863	email
6	Stone, Emma		CA	West	\$ 1,552	phone
7	Cooper, Bradley		NV	Southwest	\$ 654	phone
8	Spielberg, Steven		CA	West	\$ 3,597	email
9	Trump, Donald		CA	West	\$ 584	email
10	Winfrey, Oprah		CA	West	\$ 3,597	email
11	Lawrence, Jennifer		IL	Midwest	\$ 1,873	email
12	Jordan, Michael		IL	Midwest	\$ 517	phone
13	Streep, Meryl		CA	West	\$ 1,552	phone
14	Pitt, Brad		CA	West	\$ 1,552	phone
15	Perry, Katy		CA	West	\$ 1,552	phone
16	Obama, Barack		CA	West	\$ 1,552	phone
17	McGraw, Tim		CA	West	\$ 1,552	phone
18	John, Elton		CA	West	\$ 584	email
19	Spielberg, Steven		CA	West	\$ 3,597	email
20	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873	email

Start by clicking the drop-down arrow in the "Library" column.

Uncheck "(Select All)" to clear out all checkmarks.

Check "Chicago Public Library" and click OK.

Only the donors for the Chicago Public Library remain – the others have been filtered out. You will notice a filter icon now appears next to the drop-down arrow by the column heading.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact Preference
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone
20	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873	email
27	Murray, Bill	Chicago Public Library	IL	Midwest	\$ 2,640	email
37						
38						
39						

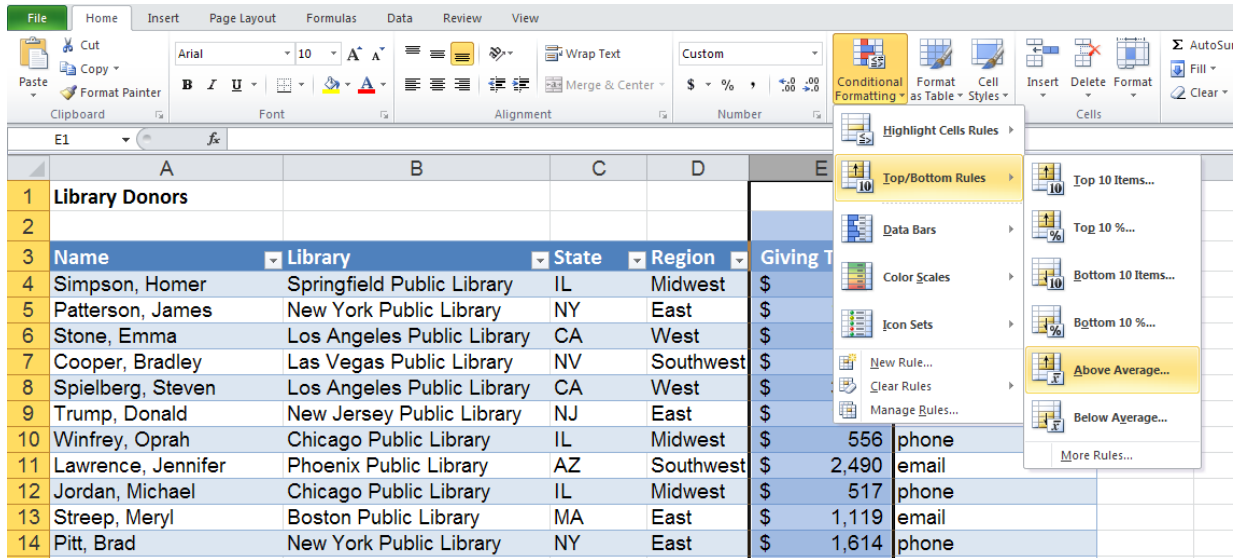
You can clear a filter by selecting the column heading, then “Clear” from the Sort & Filter section of the Data ribbon; or, you can click the column heading drop-down arrow and select the option to clear the filter.

The screenshot shows the Excel interface with the 'Data' ribbon active. In the 'Sort & Filter' group, the 'Clear' button is highlighted with a red box. Below the ribbon, the 'Library' column heading is selected, and its drop-down menu is open. The 'Clear Filter From "Library"' option is highlighted with a red box. A filter list is also visible, showing 'Chicago Public Library' selected.

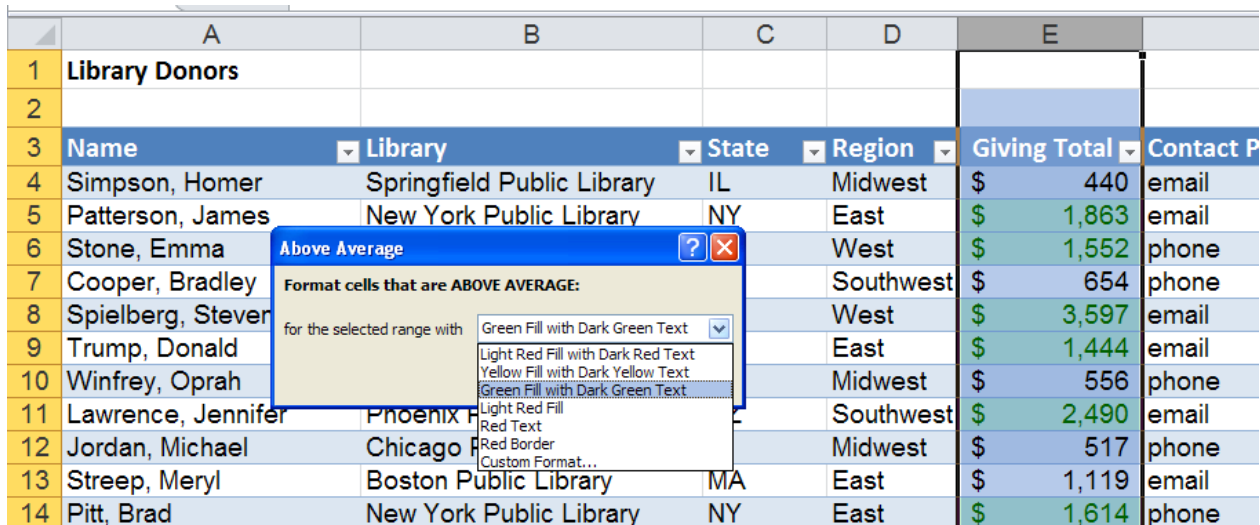
	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone
20	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873	email
27	Murray, Bill	Chicago Public Library	IL	Midwest	\$ 2,640	email
37						
38						
39						
40						
41						
42						
43						
44						
45						
46						
47						
48						

Conditional Formatting – Top/Bottom Rules

Excel 2010 offers conditional formatting options that highlight data that meet criteria that you have set. For example, it might be helpful to have Excel highlight library donors that give more than average.



Start by highlighting the column to which you wish to apply conditional formatting. Then, on the Home ribbon, select “Conditional Formatting,” “Top/Bottom Rules,” and finally, “Above Average.”



You will then be prompted choose how Excel will highlight the cells that meet the “above average” criterion. In this case, a green fill with dark green text marks the big library donors. Note that that these changes can be easily undone using the “Clear Rules” option on the “Conditional Formatting” menu.

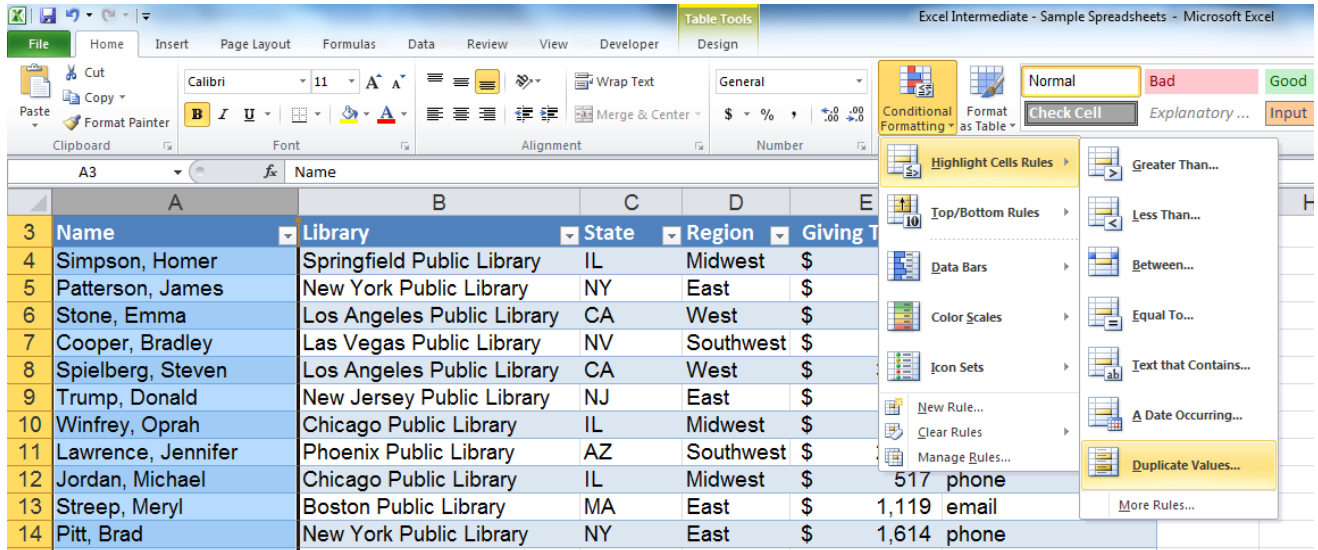
Conditional Formatting – Data Bars

Excel 2010 allows you to display graphical representations of numerical data. Adding colored data bars in this example makes it easy to see who is donating the most and least. Select the column you wish to format, select “Conditional Formatting,” then “Data Bars,” and finally the style and color of fill you want to use on your data bars.

	A	B	C	D	E
1	Library Donors				
2					
3	Name	Library	State	Region	Giving
4	Simpson, Homer	Springfield Public Library	IL	Midwest	\$
5	Patterson, James	New York Public Library	NY	East	\$
6	Stone, Emma	Los Angeles Public Library	CA	West	\$
7	Cooper, Bradley	Las Vegas Public Library	NV	Southwest	\$
8	Spielberg, Steven	Los Angeles Public Library	CA	West	\$
9	Trump, Donald	New Jersey Public Library	NJ	East	\$
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556
11	Lawrence, Jennifer	Phoenix Public Library	AZ	Southwest	\$ 2,490
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517
13	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119
14	Pitt, Brad	New York Public Library	NY	East	\$ 1,614
15	Perry, Katy	San Diego Public Library	CA	West	\$ 100
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504
17	McGraw, Tim	Nashville Public Library	TN	South	\$ 448
18	John, Elton	San Francisco Public Library	CA	West	\$ 584
19	Spielberg, Steven	Los Angeles Public Library	CA	West	\$ 3,597
20	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873
21	Schwarzenegger, Arnold	Sacramento Public Library	CA	West	\$ 695
22	Gosling, Ryan	Los Angeles Public Library	CA	West	\$ 1,176
23	Keith, Toby	Houston Public Library	TX	Southwest	\$ 346
24	Williams, Brian	New York Public Library	NY	East	\$ 3,536
25	Gaga, Lady	Los Angeles Public Library	CA	West	\$ 1,101
26	Potter, Harry	Palatine Public Library	IL	Midwest	\$ 1,376
27	Murray, Bill	Chicago Public Library	IL	Midwest	\$ 2,640
28	Fallon, Jimmy	Brooklyn Public Library	NY	East	\$ 1,456
29	Degeneres, Ellen	Los Angeles Public Library	CA	West	\$ 2,037
30	Carell, Steve	San Francisco Public Library	CA	West	\$ 538
31	King, Stephen	Augusta Public Library	ME	Northeast	\$ 291

Conditional Formatting - Highlight Cells Rules

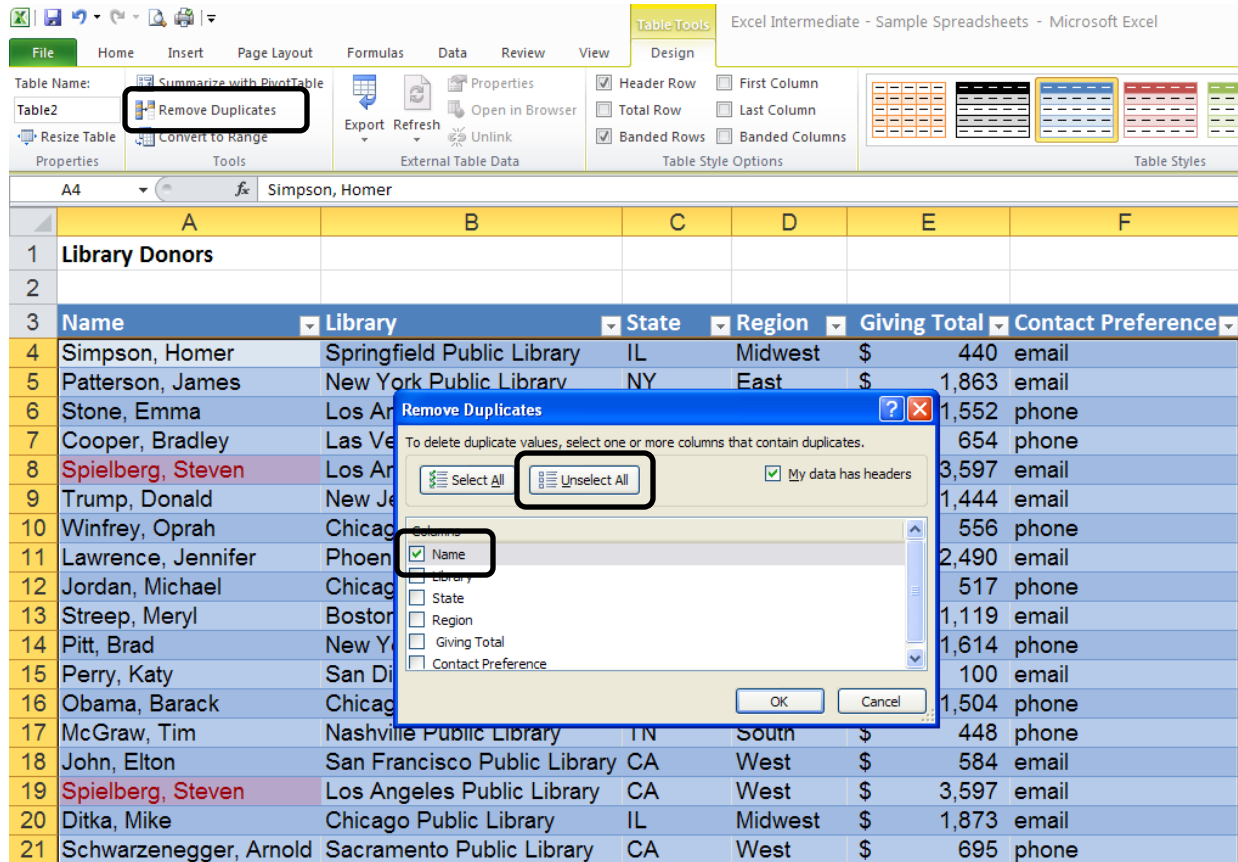
Another helpful feature of Conditional Formatting is the option to search for duplicate values. If you wanted to search through the list of donors to make sure you haven't accidentally listed somebody twice, you can select the "Name" column, then "Conditional Formatting," "Highlight Cell Rules," and finally "Duplicate Values."



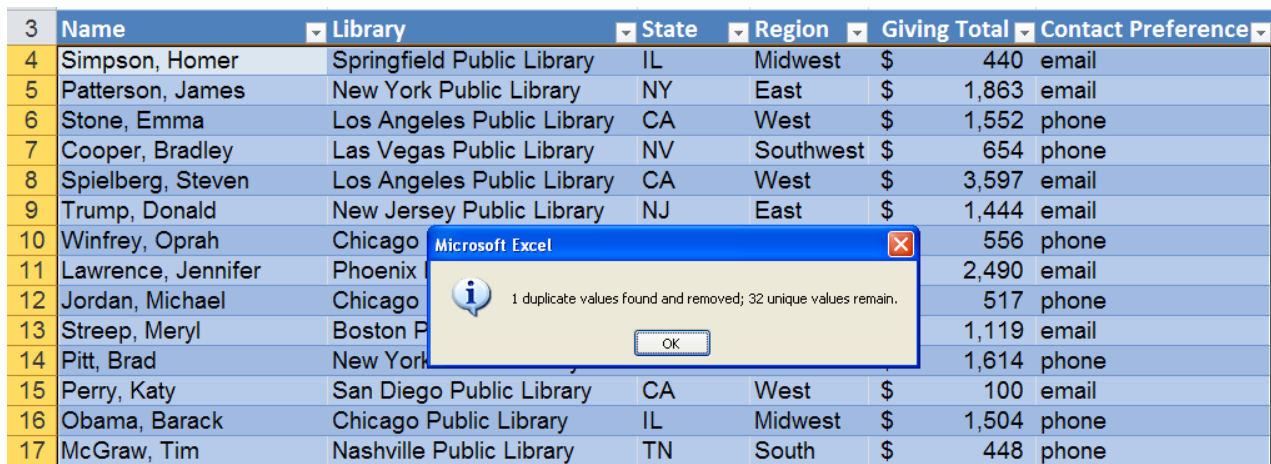
You can then select how you want Excel to mark the duplicates.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	Library	State	Region	Giving Total	Contact Pre
4	Simpson, Homer	Springfield Public Library	IL	Midwest	\$ 440	email
5	Patterson, James	New York Public Library	NY	East	\$ 1,863	email
6	Stone, Emma	Los Angeles Public Library	CA	West	\$ 1,552	phone
7	Cooper, Bradley	Las Vegas Public Library	NV	Southwest	\$ 654	phone
8	Spielberg, Steven	Los Angeles Public Library	CA	West	\$ 3,597	email
9	Trump, Donald	New Jersey Public Library	NJ	East	\$ 1,444	email
10	Winfrey, Oprah	Chicago Public Library	IL	Midwest	\$ 556	phone
11	Lawrence, Jennifer	Phoenix Public Library	AZ	Southwest	\$ 2,490	email
12	Jordan, Michael	Chicago Public Library	IL	Midwest	\$ 517	phone
13	Streep, Meryl	Boston Public Library	MA	East	\$ 1,119	email
14	Pitt, Brad	New York Public Library	NY	East	\$ 1,614	phone
15	Perry, Katy	San Diego Public Library	CA	West	\$ 100	email
16	Obama, Barack	Chicago Public Library	IL	Midwest	\$ 1,504	phone
17	McGraw, Tim	Nashville Public Library	TN	South	\$ 448	phone
18	John, Elton	San Francisco Public Library	CA	West	\$ 584	email
19	Spielberg, Steven	Los Angeles Public Library	CA	West	\$ 3,597	email
20	Ditka, Mike	Chicago Public Library	IL	Midwest	\$ 1,873	email

You can manually remove duplicates or use Excel's automated feature for removing duplicates. To use Excel's automated Remove Duplicates feature, make sure your table is selected, then click the "Design" contextual ribbon, "Remove Duplicates," and "Unselect All." **Selecting "Unselect All" is important so that Excel does not remove duplicates from any column other than the one you select** – in this case, the "Name" column. Click OK.



The duplicate donor has been removed.



Adding a Total Row

You can easily add a Total row to your table by checking the “Total Row” option on the Table Tools-Design contextual ribbon.

The screenshot shows the Microsoft Excel interface with the 'Table Tools-Design' ribbon active. The 'Total Row' checkbox is checked. Below the ribbon, a table is displayed with columns: Name, Library, State, Region, Giving Total, and Contact Preference. A 'Total' row is added at the bottom, and a dropdown menu is open over the 'Giving Total' column, showing options: None, Average, Count, Count Numbers, Max, Min, Sum.

Name	Library	State	Region	Giving Total	Contact Preference
Carell, Steve	San Francisco Public Library	CA	West	\$ 538	phone
King, Stephen	Augusta Public Library	ME	Northeast	\$ 291	email
Tatum, Channing	Atlanta Public Library	GA	South	\$ 420	phone
Clooney, George	Lexington Public Library	KY	Midwest	\$ 1,200	phone
Gates, Bill	Seattle Public Library	WA	Northwest	\$ 1,488	email
Clinton, Hillary	New York Public Library	NY	East	\$ 351	email
Woods, Tiger	Miami Public Library	FL	South	\$ 86	email
Total					33

Once the Total row is in place, click in the cell where you want a total to appear and a drop-down arrow will appear. Select whether you want Excel to calculate a sum, an average, minimum, maximum, etc.

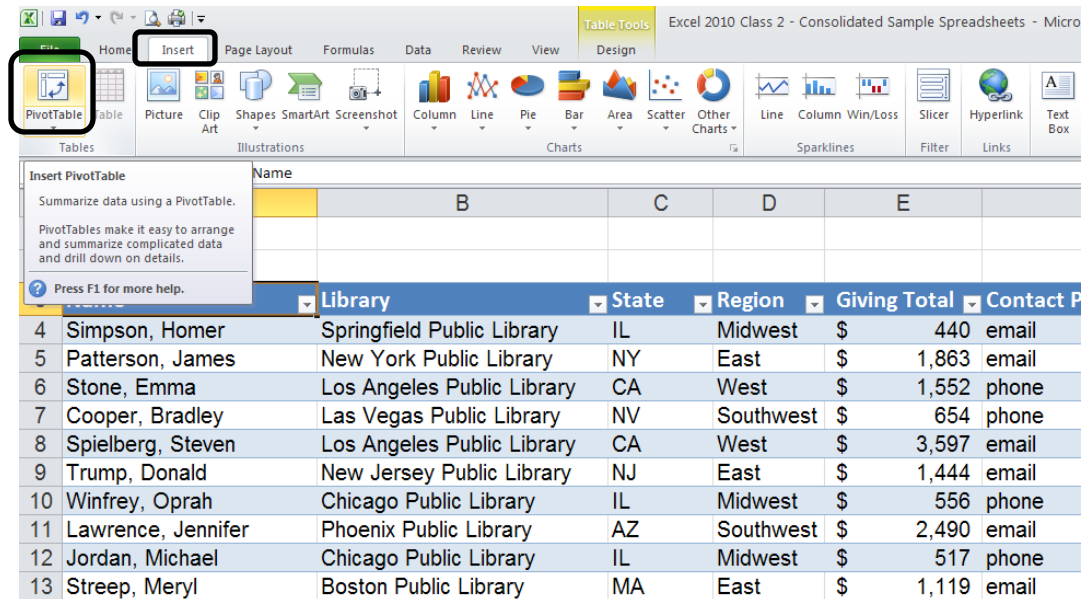
30	Ellen Degeneres	Los Angeles Public Library	CA	West	4	\$ 2,037.28	phone
31	Steve Carell	San Francisco Public Library	CA	West	2	\$ 538.60	phone
32	Stephen King	Augusta Public Library	ME	Northeast	1	\$ 291.84	email
33	Stephenie Meyer	Forks Public Library	WA	Northwest	4	\$ 420.00	phone
34	George Clooney	San Francisco Public Library	CA	West	3	\$ 1,200.80	phone
35	Bill Gates	Medina Public Library	WA	Northwest	2	\$ 1,488.80	email
36	Hillary Clinton	New York Public Library	NY	East	1	\$ 351.00	email
37	Tim Burton	San Francisco Public Library	CA	West	5	\$ 613.20	phone
38	Tiger Woods	Sacramento Public Library	FL	South	3	\$ 86.50	email
39	Total					\$ 1,181.94	35

If Excel assigns a total to a column that doesn't require a total, click the cell with the total and select “None” from the drop-down menu. This will delete the unnecessary total.

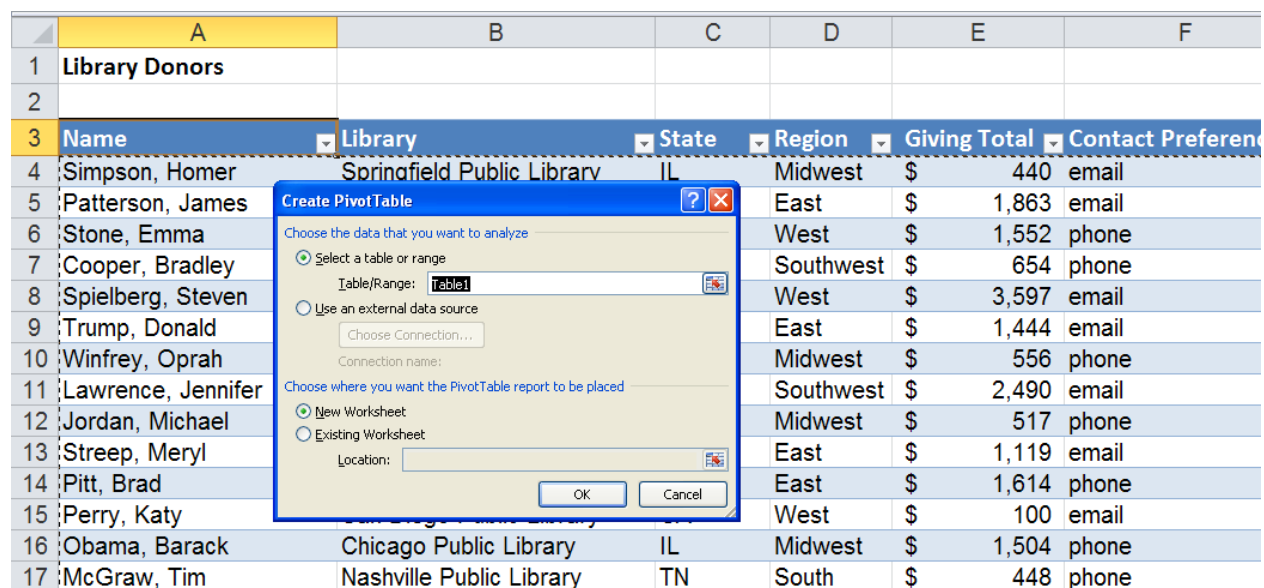
Pivot Tables

Once you have created a table in Excel 2010, it is easy to convert your table to a Pivot Table. The “Pivot Tables” feature is a flexible tool that allows you to easily analyze your data in different ways.

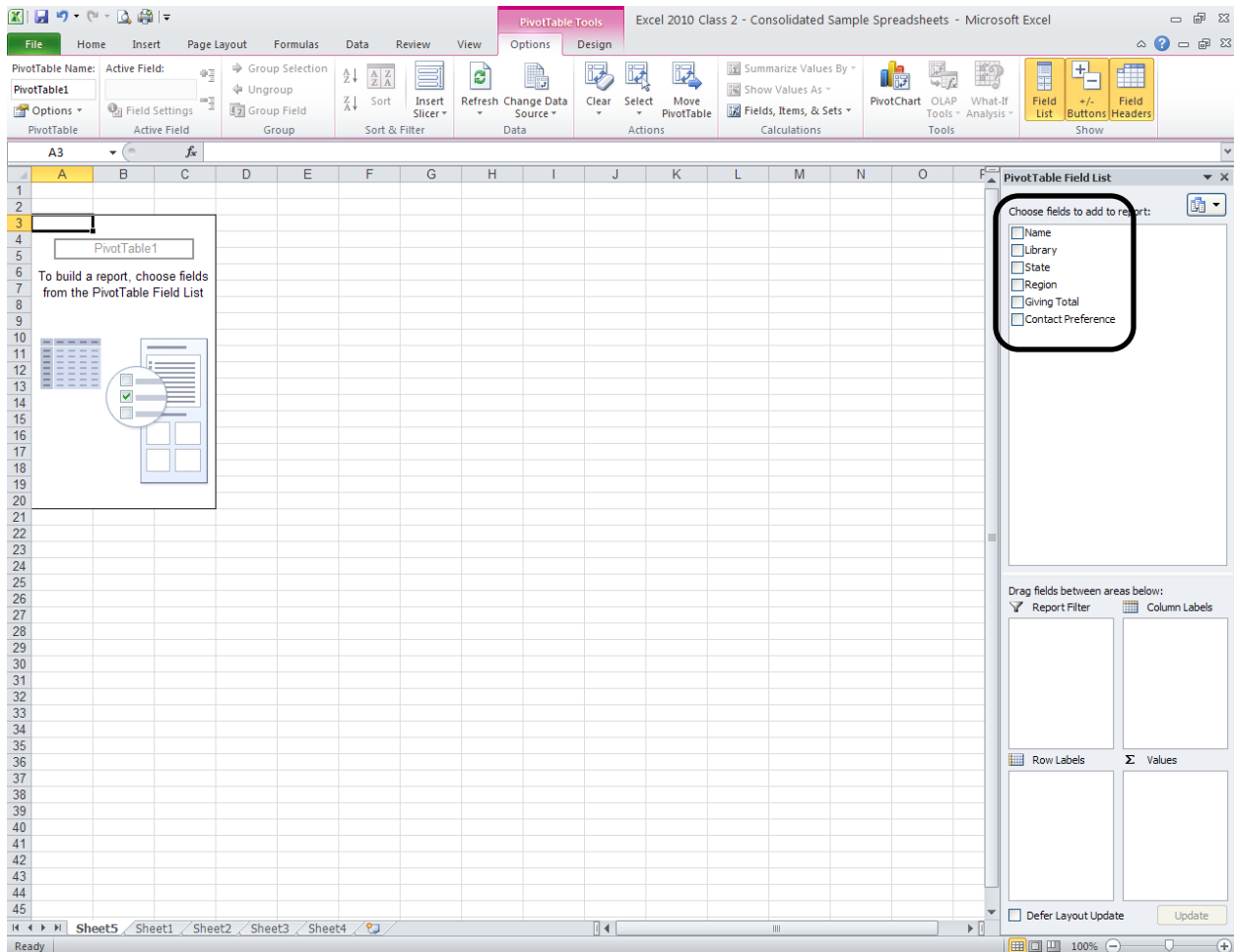
To convert your table to a Pivot Table, select the Insert ribbon, then click the “Pivot Table” button.



Make sure Excel has selected the correct data, choose “New Worksheet” or “Existing Worksheet,” depending on where you want the new pivot table to go, then select OK.



Your newly created Pivot Table should look something like this, with a list of fields taken from the original table.



You can choose which data you would like your Pivot Table to focus on by checking the data fields from the list. Excel will then try to guess if the field belongs as a filter, column label, row label, or value. Or, if you prefer, you can drag the field name to the area of your choice.

In this example, "Region" and "Giving Total" have been selected so that Excel will create a Pivot Table showing how donations in the different regions compare.

Row Labels	Sum of Giving Total
East	11383
Midwest	10106
Northeast	291
Northwest	1488
South	954
Southwest	3490
West	14977
Grand Total	42689

PivotTable Field List:

- Name
- Library
- State
- Region
- Giving Total
- Contact Preference

Row Labels: Region
Values: Sum of Giving...

You can easily add fields to your Pivot Table by checking another field from the list. In this example, the "State" field has been added by checking it in the list.

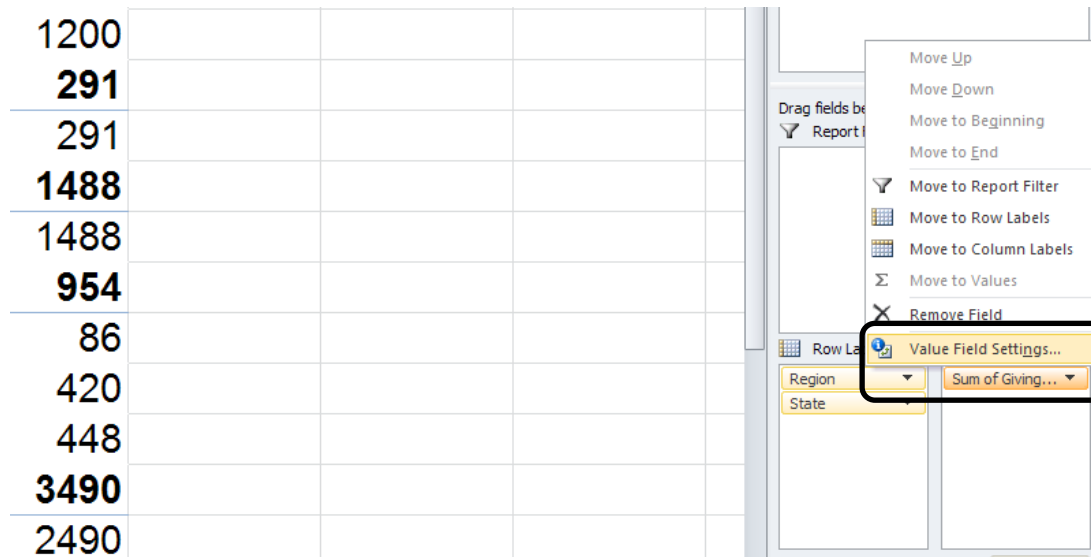
Row Labels	Sum of Giving Total
East	11383
MA	1119
NJ	1444
NY	8820
Midwest	10106
IL	8906
KY	1200
Northeast	291
ME	291
Northwest	1488

PivotTable Field List:

- Name
- Library
- State
- Region
- Giving Total
- Contact Preference

Changing Value Field Settings

If you would like the Pivot Table to show average donations instead of summing the donations, you can click on “Sum of Giving Totals” under the “Value” area, then select “Value Field Settings.”



The screenshot shows a PivotTable with the following data:

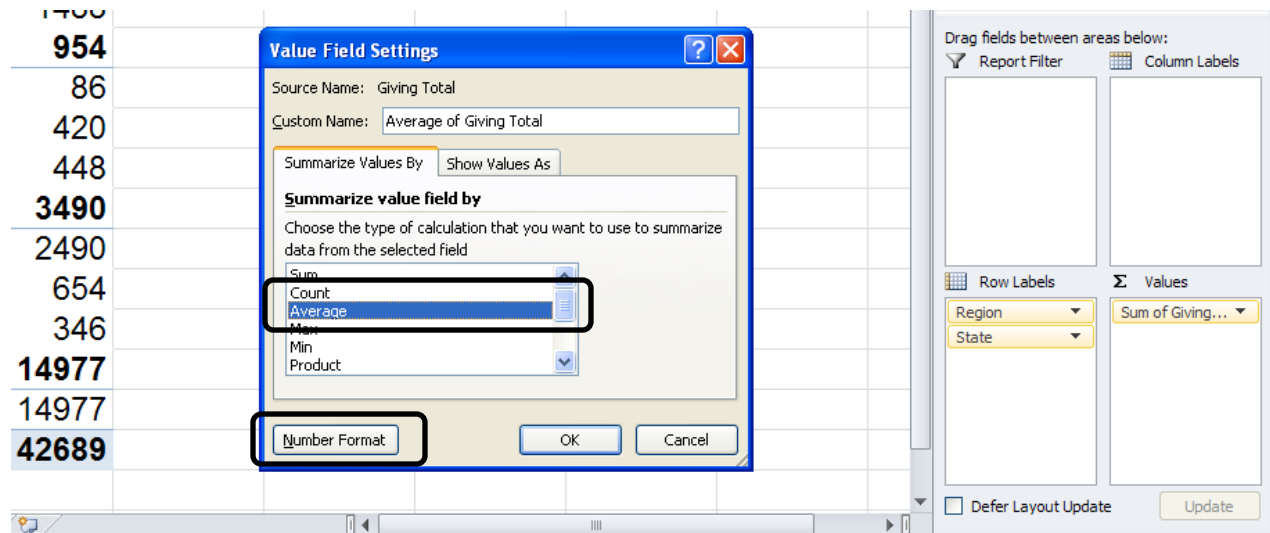
1200			
291			
291			
1488			
1488			
954			
86			
420			
448			
3490			
2490			

The PivotTable Fields task pane on the right shows the following configuration:

- Report Filter: (empty)
- Row Labels: Region, State
- Values: Sum of Giving Totals

A context menu is open over the 'Sum of Giving Totals' field, with 'Value Field Settings...' highlighted.

You can then change the “Value” setting to “Average.”



The 'Value Field Settings' dialog box is shown with the following details:

- Source Name: Giving Total
- Custom Name: Average of Giving Total
- Summarize Values By: Show Values As
- Summarize value field by: Average (selected)
- Number Format: (highlighted)
- Buttons: OK, Cancel

The PivotTable Fields task pane on the right shows the following configuration:

- Report Filter: (empty)
- Column Labels: (empty)
- Row Labels: Region, State
- Values: Sum of Giving Totals

At the bottom of the task pane, there are checkboxes for 'Defer Layout Update' and an 'Update' button.

Before clicking OK, you may wish to change the “Number Format” to “Currency” so that numeric values will appear as dollar amounts.

After selecting “Number Format”, select “Currency” and make sure the “Decimal Places” are set to 2. Click OK on both menus.

The screenshot shows a spreadsheet with a column labeled "Giving Total" containing values: 11383, 1119, 1444, 8820, 10106, 8906, 1200, 291, 291, 1488, 1488, 954, 86, 420, 448, 3490, 2490, 654, 346, 14977, 14977, and 42689. Two dialog boxes are open. The "Format Cells" dialog is set to "Currency" with "Decimal places" set to 2. The "Number Format" dialog is also open, and both have their "OK" buttons highlighted with black boxes.

Row Labels	Average of Giving Total
East	\$1,626.14
MA	\$1,119.00
NJ	\$1,444.00
NY	\$1,764.00

You will notice that donations are now displayed as averages and in currency format.

Southwest	\$1,163.33
AZ	\$2,490.00
NV	\$654.00
TX	\$346.00
West	\$1,497.70
CA	\$1,497.70
Grand Total	\$1,293.61

Pivot Tables - Slicers

Excel 2010 allows you to use the Slicer tool to filter your data. On the Pivot Table Tools contextual ribbon, select “Insert Slicer.” In this example, we will check “Library” and click OK.

Row Labels	Average of Giving Total
East	\$1,626.14
MA	\$1,119.00
NJ	\$1,444.00
NY	\$1,764.00
Midwest	\$1,263.25
IL	\$1,272.29
KY	\$1,200.00
Northeast	\$291.00
ME	\$291.00
Northwest	\$1,488.00
WA	\$1,488.00
South	\$318.00
FL	\$86.00

Holding the Ctrl button allows you to make multiple selections. In this case, the California libraries have been selected in the Slicer tool. Notice that the Pivot Table now only shows average donations to libraries in the Western region that are located in the state of California.

Row Labels	Average of Giving Total
West	\$1,497.70
CA	\$1,497.70
Grand Total	\$1,497.70

You can easily clear the filter by selecting the button in the upper right of the Slicer box.

Pivot Tables – Charts

Like other tables, Excel 2010 can easily convert a Pivot Table to a chart to display information in a more visually interesting way. Simply click on the Insert ribbon, then select the kind of chart you want.

The screenshot shows the Excel interface with the PivotTable Tools ribbon active. The 'Pie' group is expanded to show '3-D Pie' options, with 'Exploded pie in 3-D' selected. A tooltip provides the following information:

Exploded pie in 3-D
 Display the contribution of each value to a total while emphasizing individual values.
 Consider using a 3-D pie chart, and explode individual values instead.

Row Labels	Average of Giving Total
4 East	\$1,626.00
5 Midwest	\$1,263.25
6 Northeast	\$291.00
7 Northwest	\$1,488.00
8 South	\$318.00
9 Southwest	\$1,163.33
10 West	\$1,497.70
11 Grand Total	\$1,293.61

The screenshot shows the PivotChart Tools ribbon active. A 3-D exploded pie chart is displayed on the worksheet, titled 'Average of Giving Total'. The chart includes a legend for the regions:

- East
- Midwest
- Northeast
- Northwest
- South
- Southwest

Row Labels	Average of Giving Total
4 East	\$1,626.14
5 Midwest	\$1,263.25
6 Northeast	\$291.00
7 Northwest	\$1,488.00
8 South	\$318.00
9 Southwest	\$1,163.33
10 West	\$1,497.70
11 Grand Total	\$1,293.61

Sparklines

Sparklines are a new feature in Excel 2010 that allow you to create a mini chart within a single cell in order to show a visual representation of data trends.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	2012	2013	2014	2015	Sparklines
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00	
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00	
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00	
7	Bradley Cooper	\$654.00	\$865.00	\$986.00	\$1,014.00	
8	Steven Spielberg	\$3,597.00	\$3,174.00	\$2,875.00	\$2,456.00	
9	Donald Trump	\$956.00	\$714.00	\$678.00	\$515.00	
10	Oprah Winfrey	\$1,444.00	\$1,749.00	\$2,240.00	\$2,998.00	
11	Jennifer Lawrence	\$2,490.00	\$1,978.00	\$1,621.00	\$1,345.00	

Select the cell where you want your first Sparkline to appear, then select the Insert ribbon, then “Line” under the “Sparklines” menu.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	2012	2013	2014	2015	Sparklines
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00	
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00	
6	Emma Stone	\$1,552.00				
7	Bradley Cooper	\$654.00				
8	Steven Spielberg	\$3,597.00				
9	Donald Trump	\$956.00				
10	Oprah Winfrey	\$1,444.00				
11	Jennifer Lawrence	\$2,490.00	\$1,978.00	\$1,621.00	\$1,345.00	

Create Sparklines

Choose the data that you want

Data Range: B4:E4

Choose where you want the sparklines to be placed

Location Range: \$F\$4

OK Cancel

Then, highlight the data range, make sure the Sparkline location range is correct, then click OK.

The screenshot shows the Excel interface with the 'Sparkline Tools' ribbon active. The 'Design' tab is selected, showing options for 'High Point', 'Low Point', 'Negative Points', 'First Point', 'Last Point', and 'Markers'. Below the ribbon, a spreadsheet is visible with the following data:

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	2012	2013	2014	2015	Sparklines
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00	
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00	
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00	

A Sparkline chart appears showing a visual representation of that row's data. You can then AutoFill the rest of the rows.

The screenshot shows the same spreadsheet as above, but now with sparkline charts auto-filled for all rows from 4 to 16. The 'Sparklines' column (F) contains a series of small line charts, each representing the data for a specific donor from 2012 to 2015. The entire range of these charts is highlighted with a blue selection box.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	2012	2013	2014	2015	Sparklines
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00	
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00	
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00	
7	Bradley Cooper	\$654.00	\$865.00	\$986.00	\$1,014.00	
8	Steven Spielberg	\$3,597.00	\$3,174.00	\$2,875.00	\$2,456.00	
9	Donald Trump	\$956.00	\$714.00	\$678.00	\$515.00	
10	Oprah Winfrey	\$1,444.00	\$1,749.00	\$2,240.00	\$2,998.00	
11	Jennifer Lawrence	\$2,490.00	\$1,978.00	\$1,621.00	\$1,345.00	
12	Michael Jordan	\$517.00	\$994.00	\$1,023.00	\$1,256.00	
13	Brad Pitt	\$1,119.00	\$3,583.00	\$2,997.00	\$989.00	
14	Meryl Streep	\$1,614.00	\$1,087.00	\$1,879.00	\$2,042.00	
15	Katy Perry	\$100.00	\$207.00	\$368.00	\$401.00	
16	Barack Obama	\$1,504.00	\$1,718.00	\$1,865.00	\$1,987.00	

You can easily change the look of your Sparklines or convert your line graphs to bar graphs using the menu options on the Sparkline Tools Design contextual ribbon.

The screenshot shows the Microsoft Excel interface with the Sparkline Tools Design ribbon active. The ribbon includes options for Sparkline type (Line, Column, Win/Loss) and various styling options like High Point, Low Point, Negative Points, First Point, Last Point, and Markers. A yellow box highlights the 'Column' option in the Sparkline type group. Another yellow box highlights a bar chart style in the Style group. Below the ribbon is a table with data for 'Library Donors' and a column of sparklines.

	A	B	C	D	E	F
1	Library Donors					
2						
3	Name	2012	2013	2014	2015	Sparklines
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00	
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00	
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00	
7	Bradley Cooper	\$654.00	\$865.00	\$986.00	\$1,014.00	
8	Steven Spielberg	\$3,597.00	\$3,174.00	\$2,875.00	\$2,456.00	
9	Donald Trump	\$956.00	\$714.00	\$678.00	\$515.00	
10	Oprah Winfrey	\$1,444.00	\$1,749.00	\$2,240.00	\$2,998.00	
11	Jennifer Lawrence	\$2,490.00	\$1,978.00	\$1,621.00	\$1,345.00	
12	Michael Jordan	\$517.00	\$994.00	\$1,023.00	\$1,256.00	
13	Brad Pitt	\$1,119.00	\$3,583.00	\$2,997.00	\$989.00	
14	Meryl Streep	\$1,614.00	\$1,087.00	\$1,879.00	\$2,042.00	
15	Katy Perry	\$100.00	\$207.00	\$368.00	\$401.00	
16	Barack Obama	\$1,504.00	\$1,718.00	\$1,865.00	\$1,987.00	

Logical Functions

Excel offers functions that compare data using logical operators such < (less than), > (greater than), = (equal to), etc. In the example below, the logical function “IF” allows Excel to compare donors’ 2014 donations amounts to their 2012 amounts and then indicate if that donor should receive a thank you letter for increasing their donation or a phone call requesting additional funding.

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The 'Insert Function' dialog box is open, showing the 'Logical' category and the 'IF' function selected. The background spreadsheet displays a table of donors with columns for Name, 2012, 2013, 2014, 2015, Sparklines, and Thank You Letter or Phone Call?.

	A	B	C	D	E	F	G
1	Library Donors						
2							
3	Name	2012	2013	2014	2015	Sparklines	Thank You Letter or Phone Call?
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00		=
5	James Patterson	\$1,863.00					
6	Emma Stone	\$1,552.00					
7	Bradley Cooper	\$654.00					
8	Steven Spielberg	\$3,597.00					
9	Donald Trump	\$956.00					
10	Oprah Winfrey	\$1,444.00					
11	Jennifer Lawrence	\$2,490.00					
12	Michael Jordan	\$517.00					
13	Brad Pitt	\$1,119.00					
14	Meryl Streep	\$1,614.00	\$1,087.00	\$1,879.00	\$2,042.00		

Select the Formulas ribbon, then “Insert Function.” Select the category “Logical” and then select the “IF” function. Click OK.

Excel spreadsheet showing an IF formula in the formula bar: `=IF(E4>B4,"Thank You Letter","Phone Call")`. The spreadsheet displays donation amounts for 2012, 2013, 2014, and 2015, along with a Sparklines chart and a column header "Thank You Letter or Phone Call?". A "Function Arguments" dialog box is open, showing the formula arguments for the IF function:

Year	2012	2013	2014	2015
Amount	\$223.00	\$378.00	\$440.00	\$631.00
Amount	\$1,863.00	\$1,204.00	\$898.00	\$740.00
Amount	\$1,119.00	\$3,583.00	\$2,997.00	\$989.00

The "Function Arguments" dialog box shows the following configuration:

- Logical_test:** E4>B4 = TRUE
- Value_if_true:** "Thank You Letter" = "Thank You Letter"
- Value_if_false:** "Phone Call" = "Phone Call"

The dialog box also includes a description of the IF function and a "Formula result = Thank You Letter" field.

In the "Logical_test" field, click on the cell with the 2014 donation amount, enter the > (greater than) operator, click on the cell with the 2012 donation amount.

In the "Value_if_true" field, enter in quotations "Thank You Letter".

In the "Value_if_false" field, enter in quotations "Phone Call".

Observe in the formula bar at the top how Excel constructs the function.

Click OK.

Excel then uses the logical function to determine that the first donor has given more in 2014 than in 2012 and indicates that this donor needs to receive a thank you letter.

	A	B	C	D	E	F	G
1	Library Donors						
2							
3	Name	2012	2013	2014	2015	Sparklines	Thank You Letter or Phone Call?
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00		Thank You Letter
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00		
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00		
7	Bradley Cooper	\$654.00	\$865.00	\$986.00	\$1,014.00		

Simply AutoFill the rest of the column and Excel applies the logical function to each donor.

Excel Intermediate - Sample Spreadsheets - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

fx Insert Function AutoSum Recently Used Financial Logical Text Date & Time Lookup & Reference Math More Functions Name Manager Define Name Use in Formula Create from Selection Trace Precedents Trace Dependents Remove Arrows Show Formulas Error Checking Watch Window Calculation Options Calculate No Calculate Sh Calculation

	A	B	C	D	E	F	G
1	Library Donors						
2							
3	Name	2012	2013	2014	2015	Sparklines	Thank You Letter or Phone Call?
4	Homer Simpson	\$223.00	\$378.00	\$440.00	\$631.00		Thank You Letter
5	James Patterson	\$1,863.00	\$1,204.00	\$998.00	\$740.00		Phone Call
6	Emma Stone	\$1,552.00	\$1,894.00	\$2,132.00	\$1,012.00		Phone Call
7	Bradley Cooper	\$654.00	\$865.00	\$986.00	\$1,014.00		Thank You Letter
8	Steven Spielberg	\$3,597.00	\$3,174.00	\$2,875.00	\$2,456.00		Phone Call
9	Donald Trump	\$956.00	\$714.00	\$678.00	\$515.00		Phone Call
10	Oprah Winfrey	\$1,444.00	\$1,749.00	\$2,240.00	\$2,998.00		Thank You Letter
11	Jennifer Lawrence	\$2,490.00	\$1,978.00	\$1,621.00	\$1,345.00		Phone Call
12	Michael Jordan	\$517.00	\$994.00	\$1,023.00	\$1,256.00		Thank You Letter
13	Brad Pitt	\$1,119.00	\$3,583.00	\$2,997.00	\$989.00		Phone Call
14	Meryl Streep	\$1,614.00	\$1,087.00	\$1,879.00	\$2,042.00		Thank You Letter
15	Katy Perry	\$100.00	\$207.00	\$368.00	\$401.00		Thank You Letter
16	Barack Obama	\$1,504.00	\$1,718.00	\$1,865.00	\$1,987.00		Thank You Letter
17							
18							

Payment Function

Excel provides a simple way to calculate monthly loan payments using the Payment Function. First, enter into a simple spreadsheet the price, interest rate, number of payments, and a blank monthly payment line, like the example below.

	A	B	C	D	E	F	G	H
1	Payment Function							
2								
3	Car Price	\$23,000						
4	Interest Rate	4.9%						
5	Number of Payments	60						
6								
7	Monthly Payment	=						
8								
9								
10								
11								
12								
13								
14								
15								

Insert Function

Search for a function:
payment

Or select a category: Recommended

Select a function:

- PMT
- PPMT
- FV
- XNPV
- XIRR
- IPMT
- CUMIPMT

PMT(rate,nper,pv,fv,type)
Calculates the payment for a loan based on constant payments and a constant interest rate.

[Help on this function](#)

Select the cell where you want the monthly payment calculation to go, select the Formulas ribbon, and then the "Insert Function" option on the far left. An "Insert Function" dialog box will appear. Search for the "Payment" function (abbreviated PMT) and click OK.

The “Function Argument”’s box will appear. Click on the “Rate” field, then select the cell with the interest rate amount.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	Payment Function						
2							
3	Car Price	\$23,000					
4	Interest Rate	4.9%					
5	Number of Payments	60					
6							
7	Monthly Payment	=PMT(B4)					
8							

The "Function Arguments" dialog box for the PMT function is open. The "Rate" field is set to B4, which is 4.9%. The "Nper" field is empty, "Pv" is empty, "Fv" is empty, and "Type" is empty. The dialog box also shows the calculated result as 0.049.

In order to have Excel calculate the interest rate on a per-month basis, add a “/12” next to the cell address.

The screenshot shows the same Excel spreadsheet as above, but with the formula in cell B7 updated to =PMT(B4/12). The "Function Arguments" dialog box is open, and the "Rate" field is now set to B4/12, resulting in a value of 0.004083333.

For the “Nper” (number of payments) field, select the cell with the number of payments and for the “Pv” (present value) field, select the cell with the item’s price. Lastly, click OK.

The screenshot shows the Excel spreadsheet with the formula in cell B7 updated to =PMT(B4/12,B5,B3). The "Function Arguments" dialog box is open, and the "Rate" field is B4/12 (0.004083333), "Nper" is B5 (60), and "Pv" is B3 (23000). The dialog box also shows the calculated result as -432.9854312.

Excel will then display the monthly payment amount.

	A	B
1	Payment Function	
2		
3	Car Price	\$23,000
4	Interest Rate	4.9%
5	Number of Payments	60
6		
7	Monthly Payment	(\$432.99)
8		
9		

Once Excel completes the Payment Function, you can change the price, interest rate, and number of payment values to see how it impacts the monthly payment amount.

	A	B
1	Payment Function	
2		
3	Car Price	\$19,000
4	Interest Rate	4.2%
5	Number of Payments	72
6		
7	Monthly Payment	(\$298.99)
8		
9		

VLOOKUP

The VLOOKUP function in Excel is a useful tool when you need to perform calculations that reference a table with a range of values. This feature is frequently used when cross referencing incomes with income tax ranges or, as in the example below, cross referencing sales revenues with commission ranges.

The screenshot shows the Excel 2010 interface. The 'Formulas' ribbon is active, and the 'Insert Function' button is highlighted. Below the ribbon, the spreadsheet contains a table of commission rates and a table of salesperson revenues. The 'Insert Function' dialog box is open, showing the search results for 'VLOOKUP'.

	A	B	C	D	E
1					
2		Revenue is Greater than or Equal to	But Less Than	Then Commission	
3	\$	-	\$ 10,000.00	3%	
4	\$	10,001.00	\$ 25,000.00	4%	
5	\$	25,001.00	\$ 100,000.00	5%	
6	\$	100,001.00	\$ 500,000.00	6%	
7	\$	500,001.00		7%	
8					
9					
10	Salesperson	Revenue	Commission Rate	Commission Paid	
11	Brad Pitt	\$ 1,000,000.00	=		
12	Meryl Streep	\$ 8,000.00			
13	Bradley Cooper	\$ 26,000.00			
14	Jennifer Lawrence	\$ 150,000.00			
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					
32					
33					
34					
35					
36					
37					
38					
39					

Insert Function dialog box details:

- Search for a function: vlookup
- Or select a category: Recommended
- Select a function: VLOOKUP
- Function description: **VLOOKUP(lookup_value,table_array,col_index_num,range_lookup)** Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.
- Buttons: OK, Cancel

Select the cell of the first commission rate, select the Formulas ribbon and then "Insert Function." In the search field, type "VLOOKUP" and select it from the search results. Click OK.

In the "Lookup_value" field, select the cell with revenue amount.

VLOOKUP X ✓ fx =VLOOKUP()

	A	B	C	D
1				
2	Revenue is Greater than or Equal to	But Less Than	Then Commission	
3	\$ -	\$ 10,000.00	3%	
4	\$ 10,001.00	\$ 25,000.00	4%	
5	\$ 25,001.00	\$ 100,000.00	5%	
6	\$ 100,001.00	\$ 500,000.00	6%	
7	\$ 500,001.00		7%	
8				
9				
10	Salesperson	Revenue	Commission Rate	Commission Paid
11	Brad Pitt	\$ 1,000,000.00	=VLOOKUP()	
12	Meryl Streep	\$ 8,000.00		
13	Bradley Cooper	\$ 26,000.00		
14	Jennifer Lawrence	\$ 150,000.00		
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				
31				
32				
33				
34				
35				
36				
37				

Function Arguments ? X

VLOOKUP

Lookup_value B11 = any

Table_array = number

Col_index_num = number

Range_lookup = logical

=

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

Lookup_value is the value to be found in the first column of the table, and can be a value, a reference, or a text string.

Formula result =

[Help on this function](#) OK Cancel

In the "Table_array" field, highlight the data in the revenue/commission table, excluding the column headings.

	Revenue is Greater than or Equal to	But Less Than	Then Commission
3	\$ -	\$ 10,000.00	3%
4	\$ 10,001.00	\$ 25,000.00	4%
5	\$ 25,001.00	\$ 100,000.00	5%
6	\$ 100,001.00	\$ 500,000.00	6%
7	\$ 500,001.00		7%

Salesperson	Revenue	Commission Rate	Commission Paid
11 Brad Pitt	\$ 1,000,000.00	KUP(B11,A3:C7)	
12 Meryl Streep	\$ 8,000.00		
13 Bradley Cooper	\$ 26,000.00		
14 Jennifer Lawrence	\$ 150,000.00		

Function Arguments

VLOOKUP

Lookup_value: B11 = 1000000

Table_array: A3:C7 = {0,10000,0.03;10001,25000,0.04;2...

Col_index_num: = number

Range_lookup: = logical

=

Important: The "Table_array" range must then be converted to absolute values by entering a \$ before each column letter and each row number.

Function Arguments

VLOOKUP

Lookup_value: B11 = 10000

Table_array: \$A\$3:\$C\$7 = {0,100

Col_index_num: = num

Range_lookup: = logic

=

In the "Col_index_num" field, enter the relative column number of the Commission data. This table has three columns and the Commission data is in the third column, so enter 3.

VLOOKUP			
=VLOOKUP(B11,\$A\$3:\$C\$7,3)			
	A	B	C
1			
2	Revenue is Greater than or Equal to	But Less Than	Then Commission
3	\$ -	\$ 10,000.00	3%
4	\$ 10,001.00	\$ 25,000.00	4%
5	\$ 25,001.00	\$ 100,000.00	5%
6	\$ 100,001.00	\$ 500,000.00	6%
7	\$ 500,001.00		7%
8			
9			
10	Salesperson	Revenue	Commission Rate
11	Brad Pitt	\$ 1,000,000.00	=VLOOKUP(B11,\$A\$3:\$C\$7,3)
12	Meryl Streep	\$ 8,000.00	
13	Bradley Cooper	\$ 26,000.00	
14	Jennifer Lawrence	\$ 150,000.00	

Function Arguments

VLOOKUP

Lookup_value B11 = 1000000

Table_array \$A\$3:\$C\$7 = {0,10000,0.03;10001,25000,0.04;25000,100000,0.05;100001,500000,0.06;500001,0,0.07}

Col_index_num 3 = 3

Range_lookup = logical

= 0.07

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

Col_index_num is the column number in table_array from which the matching value should be returned. The first column of values in the table is column 1.

Formula result = 0.07

[Help on this function](#)

OK Cancel

36

Excel then cross references the salesperson's revenue with the revenue/commission table and determines the appropriate commission rate.

C11		fx		=VLOOKUP(B11,\$A\$3:\$C\$7,3)	
	A	B	C	D	
1					
2	Revenue is Greater than or Equal to	But Less Than	Then Commission		
3	\$ -	\$ 10,000.00	3%		
4	\$ 10,001.00	\$ 25,000.00	4%		
5	\$ 25,001.00	\$ 100,000.00	5%		
6	\$ 100,001.00	\$ 500,000.00	6%		
7	\$ 500,001.00		7%		
8					
9					
10	Salesperson	Revenue	Commission Rate	Commission Paid	
11	Brad Pitt	\$ 1,000,000.00	7%		
12	Meryl Streep	\$ 8,000.00			
13	Bradley Cooper	\$ 26,000.00			
14	Jennifer Lawrence	\$ 150,000.00			
15					
16					

Use AutoFill to determine the commission rates of the other salespersons.

	A	B	C	D	
1					
2	Revenue is Greater than or Equal to	But Less Than	Then Commission		
3	\$ -	\$ 10,000.00	3%		
4	\$ 10,001.00	\$ 25,000.00	4%		
5	\$ 25,001.00	\$ 100,000.00	5%		
6	\$ 100,001.00	\$ 500,000.00	6%		
7	\$ 500,001.00		7%		
8					
9					
10	Salesperson	Revenue	Commission Rate	Commission Paid	
11	Brad Pitt	\$ 1,000,000.00	7%		
12	Meryl Streep	\$ 8,000.00	3%		
13	Bradley Cooper	\$ 26,000.00	5%		
14	Jennifer Lawrence	\$ 150,000.00	6%		
15					
16					

Calculating the commission paid to each sales person is a simple multiplication formula, multiplying the Revenue cell with the Commission Rate cell.

1				
2	Revenue is Greater than or Equal to	But Less Than	Then Commission	
3	\$ -	\$ 10,000.00	3%	
4	\$ 10,001.00	\$ 25,000.00	4%	
5	\$ 25,001.00	\$ 100,000.00	5%	
6	\$ 100,001.00	\$ 500,000.00	6%	
7	\$ 500,001.00		7%	
8				
9				
10	Salesperson	Revenue	Commission Rate	Commission Paid
11	Brad Pitt	\$ 1,000,000.00	7%	=B11*C11
12	Meryl Streep	\$ 8,000.00	3%	
13	Bradley Cooper	\$ 26,000.00	5%	
14	Jennifer Lawrence	\$ 150,000.00	6%	
15				

1				
2	Revenue is Greater than or Equal to	But Less Than	Then Commission	
3	\$ -	\$ 10,000.00	3%	
4	\$ 10,001.00	\$ 25,000.00	4%	
5	\$ 25,001.00	\$ 100,000.00	5%	
6	\$ 100,001.00	\$ 500,000.00	6%	
7	\$ 500,001.00		7%	
8				
9				
10	Salesperson	Revenue	Commission Rate	Commission Paid
11	Brad Pitt	\$ 1,000,000.00	7%	\$ 70,000.00
12	Meryl Streep	\$ 8,000.00	3%	
13	Bradley Cooper	\$ 26,000.00	5%	
14	Jennifer Lawrence	\$ 150,000.00	6%	
15				

AutoFill the remaining commissions.

1				
2	Revenue is Greater than or Equal to	But Less Than	Then Commission	
3	\$ -	\$ 10,000.00	3%	
4	\$ 10,001.00	\$ 25,000.00	4%	
5	\$ 25,001.00	\$ 100,000.00	5%	
6	\$ 100,001.00	\$ 500,000.00	6%	
7	\$ 500,001.00		7%	
8				
9				
10	Salesperson	Revenue	Commission Rate	Commission Paid
11	Brad Pitt	\$ 1,000,000.00	7%	\$ 70,000.00
12	Meryl Streep	\$ 8,000.00	3%	\$ 240.00
13	Bradley Cooper	\$ 26,000.00	5%	\$ 1,300.00
14	Jennifer Lawrence	\$ 150,000.00	6%	\$ 9,000.00
15				
16				

External Cell Reference

It might be necessary to reference a cell from another worksheet within the workbook. An example would be collecting quarterly totals into an annual report on a separate worksheet. Say the quarterly budget totals are one worksheet and we want to add them together on a separate worksheet.

	A	B	C	D	E	F	G	H
1	External Cell Reference							
2								
3	Smith Family Budget 1st Quarter 2014							
4								
5		Income	Mortgage	Utilities	Cell Phone	Groceries		
6	1/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
7	2/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
8	3/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
9	Quarterly Total	\$21,000	\$6,000	\$1,500	\$375	\$2,100		
10								
11								
12	Smith Family Budget 2nd Quarter 2014							
13								
14		Income	Mortgage	Utilities	Cell Phone	Groceries		
15	4/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
16	5/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
17	6/1/14	\$7,000	\$2,000	\$500	\$125	\$700		
18	Quarterly Total	\$21,000	\$6,000	\$1,500	\$375	\$2,100		

Add the quarterly totals for all four quarters (3rd and 4th quarters not shown) and display the results in these cells

	A	B	C	D	E	F	G	H	I
1	External Cell Reference								
2									
3	Smith Family Budget Annual								
4									
5	Year	Income	Mortgage	Utilities	Cell Phone	Groceries			
6	2014	↓	↓	↓	↓	↓			
7									
8									
9									

The formula looks like this:

	A	B	C	D	E	F	G	H	I	J	
1	External Cell Reference										
2											
3	Smith Family Budget Annual										
4											
5	Year	Income	Mortgage	Utilities	Cell Phone	Groceries					
6	2014	=SUM('quarterly totals'!B9,'quarterly totals'!B18,'quarterly totals'!B27,'quarterly totals'!B36)									
7		SUM(number1, [number2], [number3], [number4], [number5], ...)									
8											
9											

Note that the source worksheet name has single quotes. This is because the worksheet name contains a space.

	A	B	C	D	E	F	G
1	External Cell Reference						
2							
3	Smith Family Budget Annual						
4							
5	Year	Income	Mortgage	Utilities	Cell Phone	Groceries	
6	2014	\$84,000	\$24,000	\$6,000	\$1,500	\$8,400	
7							
8							
9							
10							
11							
12							