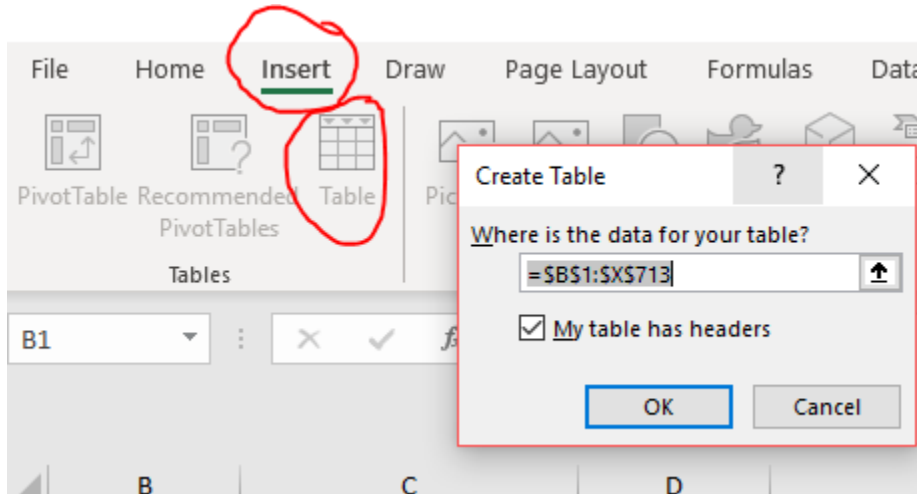


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How to turn Excel into a table with filters

1. Select Insert from the top ribbon,
2. Select Table,
3. Make sure the data for your table is selecting all the data and select OK.



*Image 1. Making a table in Excel*

How to add pivot tables in Excel

1. Select Insert Pivot Table from the top ribbon, hit okay.

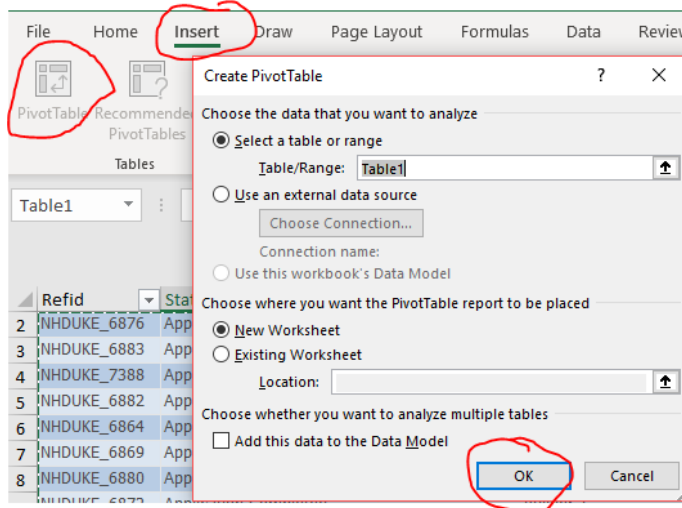


Image 2. Adding a pivot table in Excel - 1

2. Drag fields from the table on the right to the bottom left. The example below will give you the check amount by year.

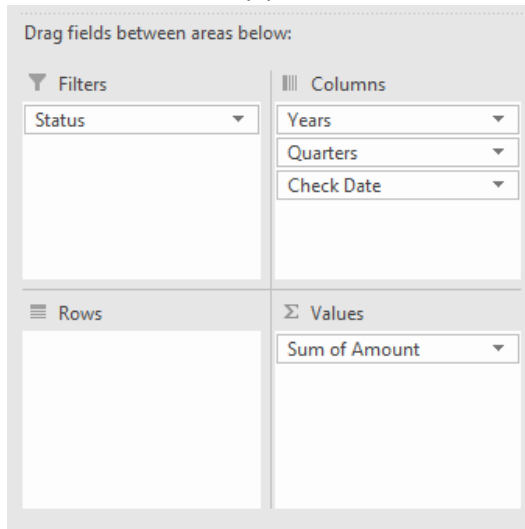


Image 3. Adding a pivot table in Excel-2

3. To expand the table hit the + sign

| Column Labels |        |        |        |        |        |        |        |            |        |             |
|---------------|--------|--------|--------|--------|--------|--------|--------|------------|--------|-------------|
|               | + 2016 | + 2017 | + 2018 | - 2019 |        |        |        | 2019 Total | + 2020 | Grand Total |
|               |        |        |        | + Qtr1 | + Qtr2 | + Qtr3 | + Qtr4 |            |        |             |
| Sum of Amount | 33000  | 393000 | 216000 | 93000  | 69000  | 96000  | 66000  | 324000     | 45000  | 1011000     |

Image 4. Adding a pivot table in Excel-3

## Appendix A: Google Sheets

### How to add filter in Google Sheets

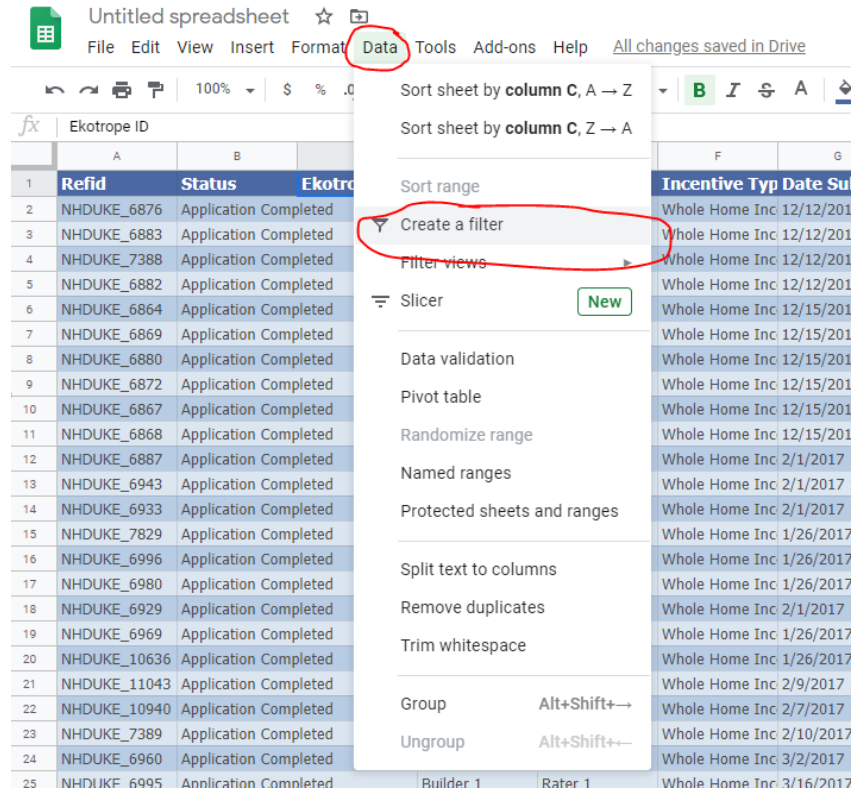

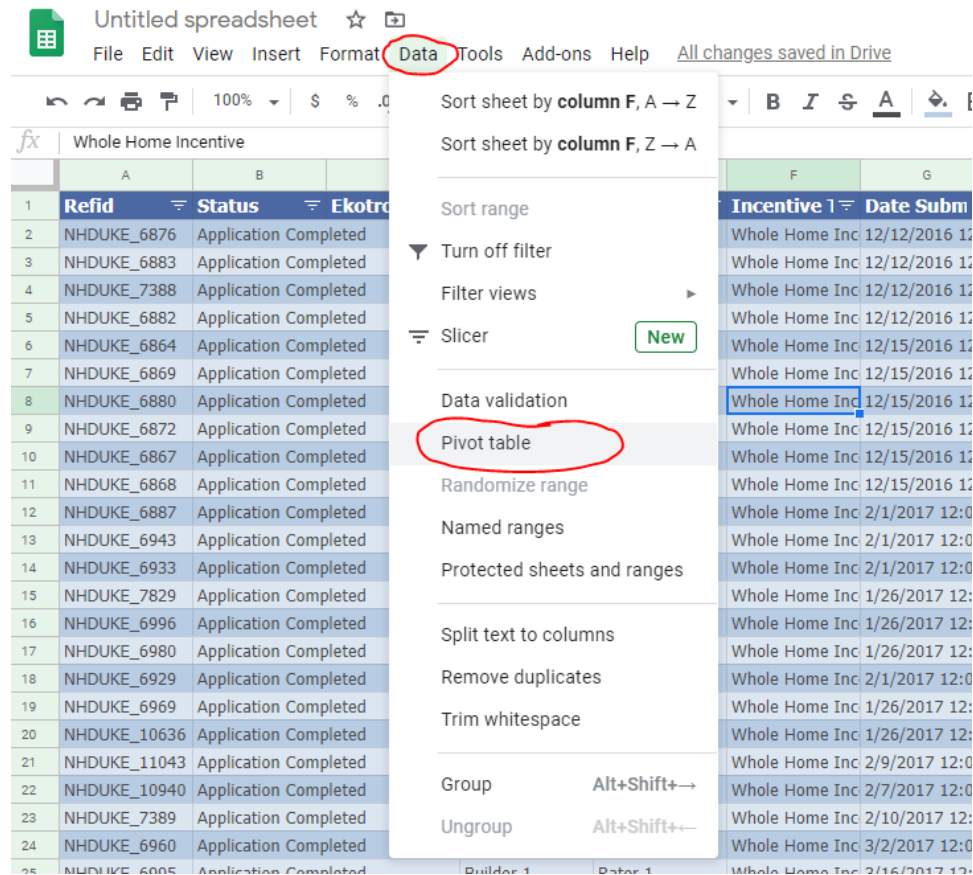


Image 1. Example of how to add filters in Google Sheets

1. Click on cell A1
2. Click on Data > Create a filter
3. You should now be able to click on the 3 lines (  ) next to any of the column headers and filter or sort.

How to add Pivot Table in Google Sheets



*Image 2. Example of how to add pivot table in Google Sheets*

1. Click on cell A1
2. Click on Data > Pivot Table
3. Confirm data range is correct and insert to New Sheet, Create
4. Select the values you want in each field (example below in Image 3).
  - a. If using the date in a pivot table, right click on one of the dates > Create Pivot table Group > Select Year to get the result in Image 4.

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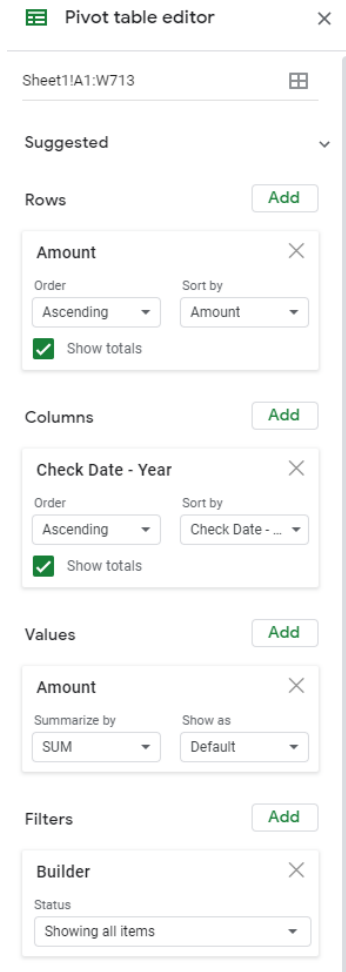


Image 3. Google Sheets Pivot Table filters Example

|                      | A                        | B             | C             | D             | E            | F                  | G              | H       |
|----------------------|--------------------------|---------------|---------------|---------------|--------------|--------------------|----------------|---------|
| <i>SUM of Amount</i> | <i>Check Date - Year</i> |               |               |               |              |                    |                |         |
| <b>Amount</b>        | <b>2016</b>              | <b>2017</b>   | <b>2018</b>   | <b>2019</b>   | <b>2020</b>  | <b>Grand Total</b> |                |         |
|                      | 3000                     | 33000         | 393000        | 216000        | 324000       | 45000              | 1125000        | 2136000 |
| <b>Grand Total</b>   | <b>33000</b>             | <b>393000</b> | <b>216000</b> | <b>324000</b> | <b>45000</b> | <b>1125000</b>     | <b>2136000</b> |         |

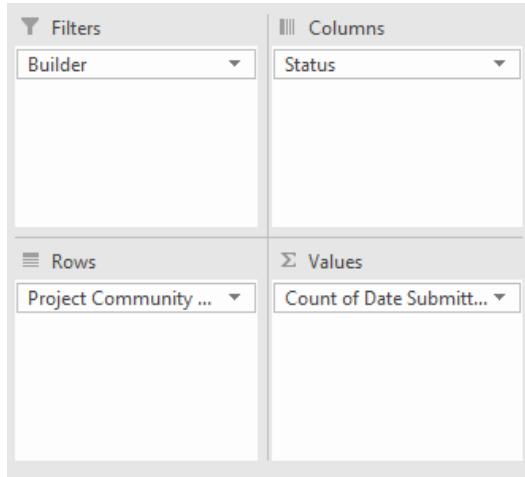
Image 4. Google Sheets Pivot Table Example of result

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**Appendix B: Example of pivot table filters**

Copy the below pivot table filters to get the below table.

**Example 1.** Count of applications by Community name

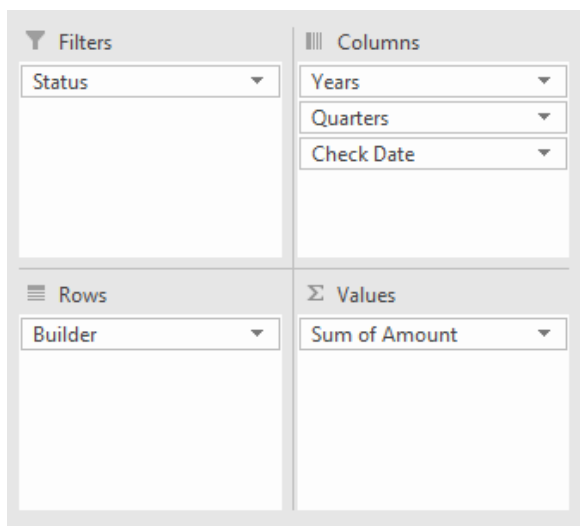


The screenshot shows a PivotTable configuration with the following settings:

- Filters:** Builder
- Columns:** Status
- Rows:** Project Community ...
- Values:** Count of Date Submitt...

| Builder                 | (All)                 |                       |                         |                |                         |                  |             |
|-------------------------|-----------------------|-----------------------|-------------------------|----------------|-------------------------|------------------|-------------|
| Count of Date Submitted | Column Labels         |                       |                         |                |                         |                  |             |
| Row Labels              | Application Cancelled | Application Completed | Home Information Flawed | Home Submitted | Home under construction | Invoice Approved | Grand Total |
| Community 1             |                       | 8                     |                         |                |                         |                  | 8           |
| Community 2             |                       | 35                    |                         |                |                         |                  | 35          |
| Community 3             |                       | 235                   |                         |                |                         |                  | 235         |
| Community 4             | 6                     | 59                    |                         |                |                         |                  | 65          |
| Community 5             | 20                    | 1                     | 1                       | 2              |                         | 7                | 31          |
| <b>Grand Total</b>      | <b>26</b>             | <b>338</b>            | <b>1</b>                | <b>2</b>       |                         | <b>7</b>         | <b>374</b>  |

**Example 2.** Sum of incentive amount by builder by year



The screenshot shows a PivotTable configuration with the following settings:

- Filters:** Status
- Columns:** Years, Quarters, Check Date
- Rows:** Builder
- Values:** Sum of Amount

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| Status (Multiple Items) <input type="button" value="v"/>     |                                       |                                       |                                       |                                       |               |
|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------|
| Sum of Amount Column Labels <input type="button" value="v"/> |                                       |                                       |                                       |                                       |               |
|  | <input type="button" value="+"/> 2017 | <input type="button" value="+"/> 2018 | <input type="button" value="+"/> 2019 | <input type="button" value="+"/> 2020 | Grand Total   |
| Row Labels <input type="button" value="v"/>                  |                                       |                                       |                                       |                                       |               |
| Builder 1  | 39000                                 |                                       |                                       |                                       | 39000         |
| Builder 2  | 66000                                 |                                       |                                       |                                       | 66000         |
| Builder 3  | 288000                                | 216000                                | 324000                                | 45000                                 | 873000        |
| <b>Grand Total</b>   | <b>393000</b>                         | <b>216000</b>                         | <b>324000</b>                         | <b>45000</b>                          | <b>978000</b> |