

### 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.

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I	mage 1. Mak	king a table i	in Exce	1		



#### How to add pivot tables in Excel

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

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ſ	I.		2	Creat	e PivotTable	:		?	×
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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.

Drag fields between areas belo	DW:
<b>T</b> Filters	III Columns
Status 🔻	Years 🔻
	Quarters 🔻
	Check Date 🔻
Rows	$\Sigma$ Values
	Sum of Amount 🔻

Image 3. Adding a pivot table in Excel-2

3. To expand the table hit the + sign

(	Column Labels 耳									
	± 2016	± 2017	± 2018	<b>□ 2019</b>				2019 Total	± 2020	Grand Total
				<b>⊞Qtr1</b>	<b>⊞Qtr2</b>	<b>⊞Qtr3</b>	⊕ Qtr4			
Sum of Amount	33000	393000	216000	93000	69000	96000	66000	324000	45000	1011000
Ime	age 4. Adding a p	oivot ta	ble in E	xcel-3						



### **Appendix A: Google Sheets**

#### How to add filter in Google Sheets

		spreadsheet ☆ View Insert Format	€ Dat	a Tools Add-ons	s Help <u>All cl</u>	<u>nanges saved i</u>	n Drive	
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9	NHDUKE_6872	Application Completed		Pivot table		Whole Home	Inc 12/	15/201
10	NHDUKE_6867	Application Completed		PIVOLIADIE		Whole Home	[nc 12/	15/201
11	NHDUKE_6868	Application Completed		Randomize range		Whole Home	[nc 12/	15/201
12	NHDUKE_6887	Application Completed		Named ranges		Whole Home	[nc 2/1	/2017
13	NHDUKE_6943	Application Completed		Nattieu taliges		Whole Home	[nc 2/1	/2017
14	NHDUKE_6933	Application Completed		Protected sheets	and ranges	Whole Home	[nc 2/1	/2017
15	NHDUKE_7829	Application Completed				Whole Home	[nc 1/2	6/2017
16	NHDUKE_6996	Application Completed		Split text to colur	nns	Whole Home	[nc 1/2	6/2017
17	NHDUKE_6980	Application Completed		opine text to colum		Whole Home	[nc 1/2	6/2017
18	NHDUKE_6929	Application Completed		Remove duplicate	es	Whole Home	[nc 2/1	/2017
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20	NHDUKE_10636	Application Completed		min wintespace		Whole Home	[nc 1/2	6/2017
21	NHDUKE_11043	Application Completed				Whole Home	[nc 2/9	/2017
22	NHDUKE_10940	Application Completed		Group	Alt+Shift+→	Whole Home	[nc 2/7	/2017
23	NHDUKE_7389	Application Completed		Ungroup	Alt+Shift+←	Whole Home	[nc 2/1	0/2017
24	NHDUKE_6960	Application Completed				Whole Home	[nc 3/2	/2017
25	NHDUKE 6995	Application Completed		Builder 1	Rater 1	Whole Home	Inc 3/1	6/2017

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



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	File Edit	View Insert Format	Dat	a Tools Add-on	s Help <u>All ch</u>	<u>nanges sa</u>	aved in D	rive	
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16	NHDUKE_6996	Application Completed		Split text to colur	nne	Whole H	lome Inc	1/26/2	2017 12:
17	NHDUKE_6980	Application Completed		opint text to colui	1113	Whole H	lome Inc	1/26/2	2017 12:
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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.

# Weekly Report Helpful Tips





Pivot table editor  $\times$ Sheet1!A1:W713 ⊞ Suggested ~ Add Rows  $\times$ Amount Order Sort by Ascending -Amount Ŧ Show totals Columns Add  $\times$ Check Date - Year Sort by Order Ascending \* Check Date - ... 🔻 Show totals Add Values  $\times$ Amount Summarize by Show as SUM + Default Ŧ Filters Add  $\times$ Builder Status Showing all items Ŧ

Image 3. Google Sheets Pivot Table filters Example

A	в	С	D	E	F	G	н
SUM of Amount	Check Date - Yes	ar					
Amount	2016	2017	2018	2019	2020		Grand Total
3000	33000	393000	216000	324000	45000	1125000	2136000
Grand Total	33000	393000	216000	324000	45000	1125000	2136000

Image 4. Google Sheets Pivot Table Example of result



## 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

<b>T</b> Filters	III Columns
Builder 💌	Status 🔻
Rows	$\Sigma$ Values
■ Rows Project Community ▼	∑ Values Count of Date Submitt ▼

Builder	(All)						
Count of Date Submitte	d Column Labels 🚽 👻						
Row Labels	<ul> <li>Application Cancelled</li> </ul>	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			<u> </u>		235
Community 4	6	i 59			-		65
Community 5	20	) 1	1	. 2		7	31
Grand Total	26	j 338	1	. 2		7	374

Example 2. Sum of incentive amount by builder by year

<b>T</b> Filters	III Columns
Status 💌	Years 🔻
	Quarters 🔻
	Check Date 🔻
Rows	$\Sigma$ Values
Builder 🔻	Sum of Amount 🔻

### Weekly Report Helpful Tips

Residential New Construction Program



Status	(Multiple Items) 🖵				
Sum of Amount	Column Labels 🛛 🖵				
	± 2017	± 2018	± 2019	± 2020	Grand Total
Row Labels 🛛 🔻	]				
Builder 1	39000				39000
Builder 2	66000				66000
Builder 3	288000	216000	324000	45000	873000
Grand Total	393000	216000	324000	45000	978000