

Excel Subtotals Straight to the Point

Bill Jelen

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Straight to the Point

The Straight to the Point e-books are designed to thoroughly cover one targeted aspect of Excel.

EXCEL SUBTOTALS

Straight to the Point

Bill Jelen

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ABOUT THE AUTHOR

Bill Jelen is the host of MrExcel.com and the author of 54 books about Microsoft Excel including Excel Gurus Gone Wild, Pivot Table Data Crunching, and Excel 2016 In Depth. He has made over 80 guest appearances on TV's Call for Help with Leo Laporte and was voted guest of the year on the Computer America radio show.

He writes the monthly Excel column for Strategic Finance magazine. He has produced over 2100 episodes of his daily video podcast Learn Excel from MrExcel. Before founding MrExcel.com in 1998, Jelen spent twelve years "in the trenches", as a financial analyst for the accounting, finance, marketing, and operations departments of a publicly held company. Since then, his company automates Excel reports for hundreds of clients around the world. The website answers over 30,000 questions a year – for free – for readers all over the world. Jelen hails from Merritt Island, Florida.

WHY HAVE A BOOK ON SUBTOTALS

Subtotals were added to Excel 97. That makes them newer than the pivot table. I meet people who ignore subtotals because they perceive pivot tables as more powerful. I agree that pivot tables are awesome, but for data sets with many columns of text data, the Subtotals command can produce reports that would be awkward in a pivot table.

Plus, the SUBTOTAL function, and its younger cousin, AGGREGATE, allow you to solve some problems that you can't normally solve in Excel.

This book will show you some cool tricks and techniques with the Subtotal command and how you can use the SUBTOTAL and AGGREGATE functions outside of the Subtotal command.

Download data files from <https://mrexcel.com/download-center/subtotals-243/>.

PREPARING YOUR DATA AND ADDING SUBTOTALS

HOW TO SET UP YOUR DATA FOR SUBTOTALS

Problem: I want to be able to use the powerful data commands such as Sort, Filter, Subtotal, Consolidate, and Pivot Table. Is there any special way I should set up the data to begin with?

Strategy: You need to follow all the rules to keep your data in list format:

Rule 1: Use only a single row of headings above your data. If you need to have a two-row heading, set it up as a single cell with two lines in the row. See "How to Fit a Multiline Heading into One Cell" on page 2.

Rule 2: Never leave one heading cell blank. You will find that you do this if you add a temporary column. If you forget to add a heading before you sort, this will completely throw off the IntelliSense, and Excel will sort the headings down into the data.

	E	F	G	H	I	J
1	Customer	Quantity	Revenue		COGS	Profit
2	The Lab with Leo Crew	1000	17200	17.2	8470	8730
3	Association for Computers & Te	800	15976	19.97	6776	9200
4	GL Wand	900	15759	17.51	7623	8136
5	Areef Ali & Associates	500	9155	18.31	4235	4920
6	Spain Enterprise	500	10935	21.87	5110	5825
7	The Lab with Leo Crew	1000	20090	20.09	9840	10250

Figure 1 Adding a column but forgetting the heading will cause problems.