

## QUICKLY FILTER A LIST TO CERTAIN RECORDS

**Problem:** You have 10,000 records, as shown in Fig. 641; you need to be able to quickly find records that match a criterion, such as all East ABC records.

	A	B	C	D	E	F
1	<b>Region</b>	<b>Product</b>	<b>Date</b>	<b>Customer</b>	<b>Quantity</b>	<b>Revenue</b>
2	East	XYZ	Jul-04	Nortel Networks	1000	25350
3	West	XYZ	May-04	Sun Life Financial	1000	25310
4	Central	XYZ	Feb-04	Wal-Mart	1000	25140
5	West	XYZ	Feb-04	General Motors	1000	25080
6	East	XYZ	Apr-04	Ford	1000	25060

*Fig. 641*

**Strategy:** Use the AutoFilter feature.

- 1) Make sure your data has a heading row. From the menu, select Data – Filter – AutoFilter. You will have a dropdown on each heading, as shown in Fig. 642.

	A	B	C	D	E	F
1	<b>Regio</b> ▼	<b>Produ</b> ▼	<b>Date</b> ▼	<b>Customer</b> ▼	<b>Quant</b> ▼	<b>Reveni</b> ▼
2	East	XYZ	Jul-04	Nortel Networks	1000	25350
3	West	XYZ	May-04	Sun Life Financial	1000	25310
4	Central	XYZ	Feb-04	Wal-Mart	1000	25140

Fig. 642

- 2) As shown in Fig. 643, use the dropdown to select East from the region dropdown.

	A	
1	<b>Regio</b> ▼	<b>Pr</b>
	(All)	Y
	(Top 10...)	Y
	(Custom...)	Y
	Central	Y
	East	Y
	Government	Y
	Southeast	Y
	West	Y
	Central	Y

Fig. 643

- 3) As shown in Fig. 644, select ABC from the Product dropdown.

A	B	C
<b>Regio</b> ▼	<b>Produ</b> ▼	<b>Date</b>
East	(All)	Jul-
East	(Top 10...)	Apr-
East	(Custom...)	
East	ABC	Nov-
East	DEF	Jun-
East	XYZ	Oct-

Fig. 644

**Result:** You will see only sales of product ABC in the East region, as shown in Fig. 645. All of the other rows will be hidden.

	A	B	C	D	E	F
1	Regio▼	Produ▼	Date▼	Customer▼	Quant▼	Reveni▼
65	East	ABC	Apr-04	Sun Life Financial	1000	20310
74	East	ABC	Jun-04	Verizon	1000	19630
101	East	ABC	Jul-04	Wal-Mart	1000	18660
102	East	ABC	Oct-04	Nortel Networks	900	18576
114	East	ABC	Dec-04	Wal-Mart	900	18243
117	East	ABC	Jun-04	Molson, Inc	900	18072

Fig. 645

**Caution:** To copy just the filtered records, you will have to use *Edit – Go To – Special – Visible Cells Only* to select only the visible cells on the sheet.

**Additional Information:** There are three special choices at the top of each column.

- 1) Use (All) to “cancel” a filter on one column, as shown in Fig. 646.

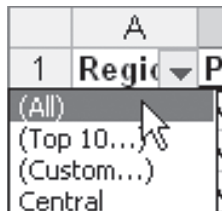


Fig. 646

- 2) As shown in Fig. 647, use Top 10... to see the top N records or the top n percent of the records.

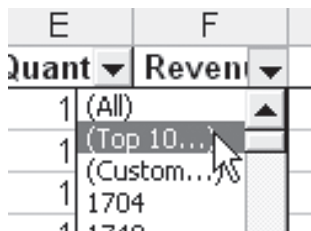


Fig. 647

- 3) After you select Top 10, the Top 10 AutoFilter dialog appears, as shown in Fig. 648. You can choose if you want the top 10 percent or the top 10 items, and also change the “10” to “5” or to any other number. This can also be used to show the bottom 10 records.

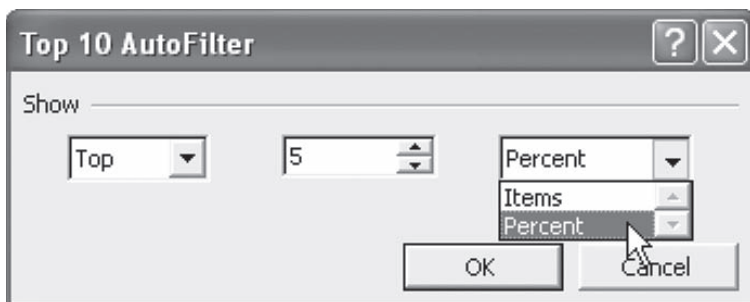


Fig. 648

- 4) As shown in Fig. 649, use Custom to build a criteria joined by AND or OR.

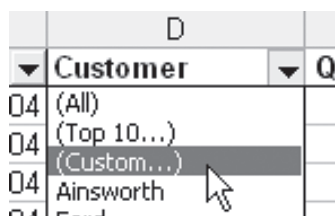


Fig. 649

- 5) In the Custom AutoFilter dialog box, you can choose two values and specify whether they should be joined by AND or OR, as shown in Fig. 650.

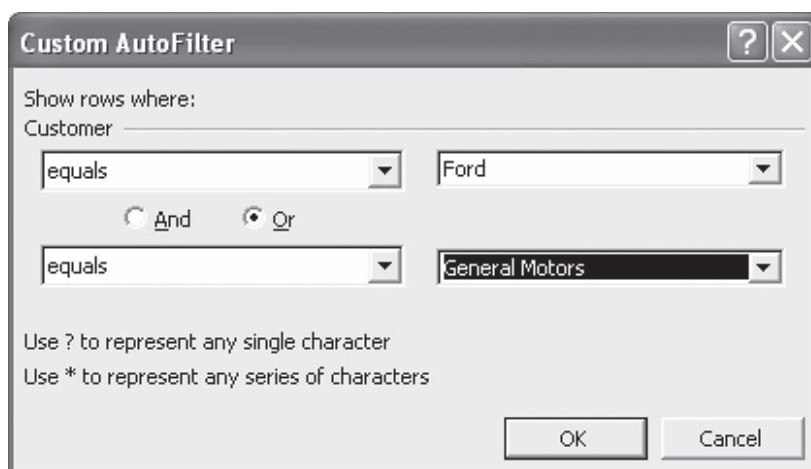


Fig. 650

- 6) To remove the AutoFilter dropdowns and show all records, go to the Data menu again and re-select AutoFilter. This will toggle the AutoFilter off.

**Summary:** Use Data – Filter – AutoFilter to have Excel show you data matching certain criteria in a column.

**Commands Discussed:** Data – Filter – AutoFilter

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