

Pssst! I learned
something new

Creating Custom Lists






I used to have to reorganize the month field headings January, February, March, etc. in chronological order every single time I created a pivot table because Excel would automatically arrange them in alphabetical order.

That was soooo irksome back in the old days.

It seemed, logically, Excel should just set the fields in chronological order.



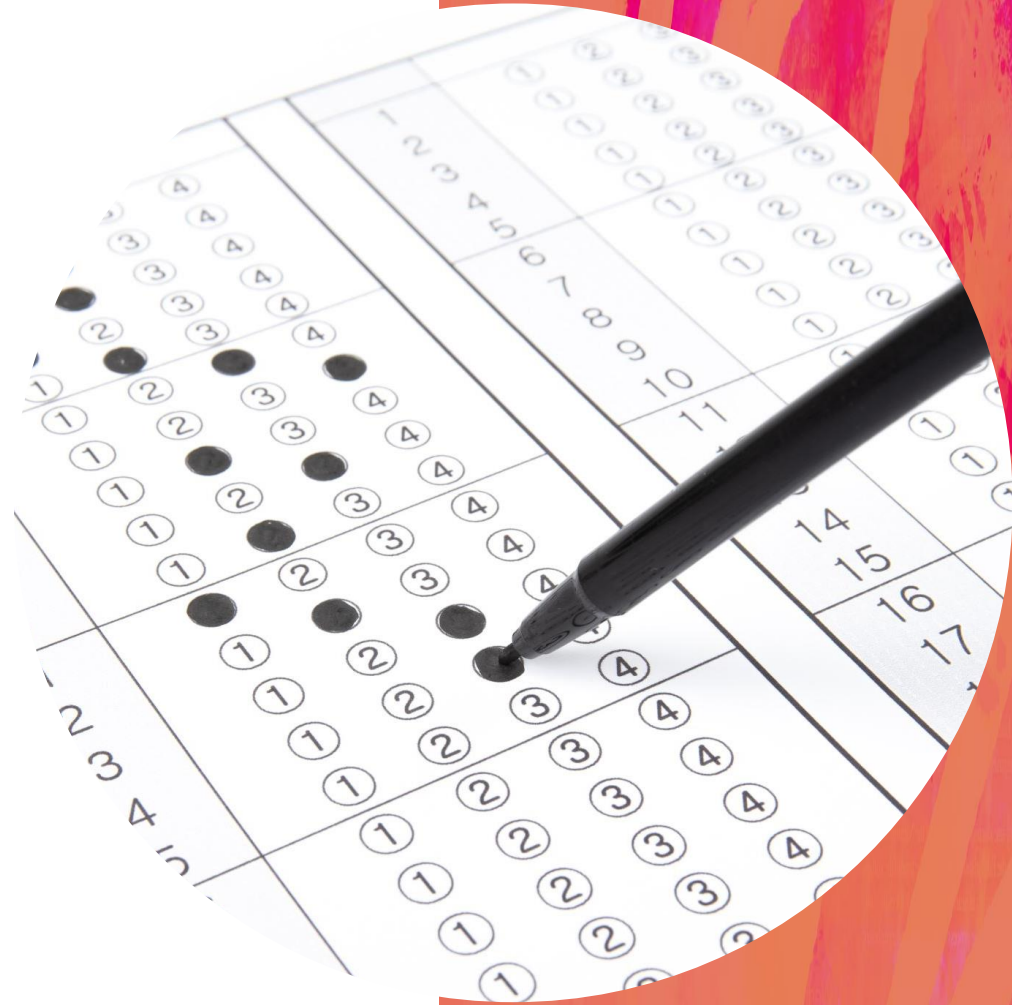
Now, Microsoft 365 has fixed that issue.

But what if you are not using Office 365?

Or you have something else you want to set the order
in Excel, maybe something like product names, or
business units?

There is something in Excel
predetermine the order.

It's called
Custom Lists.

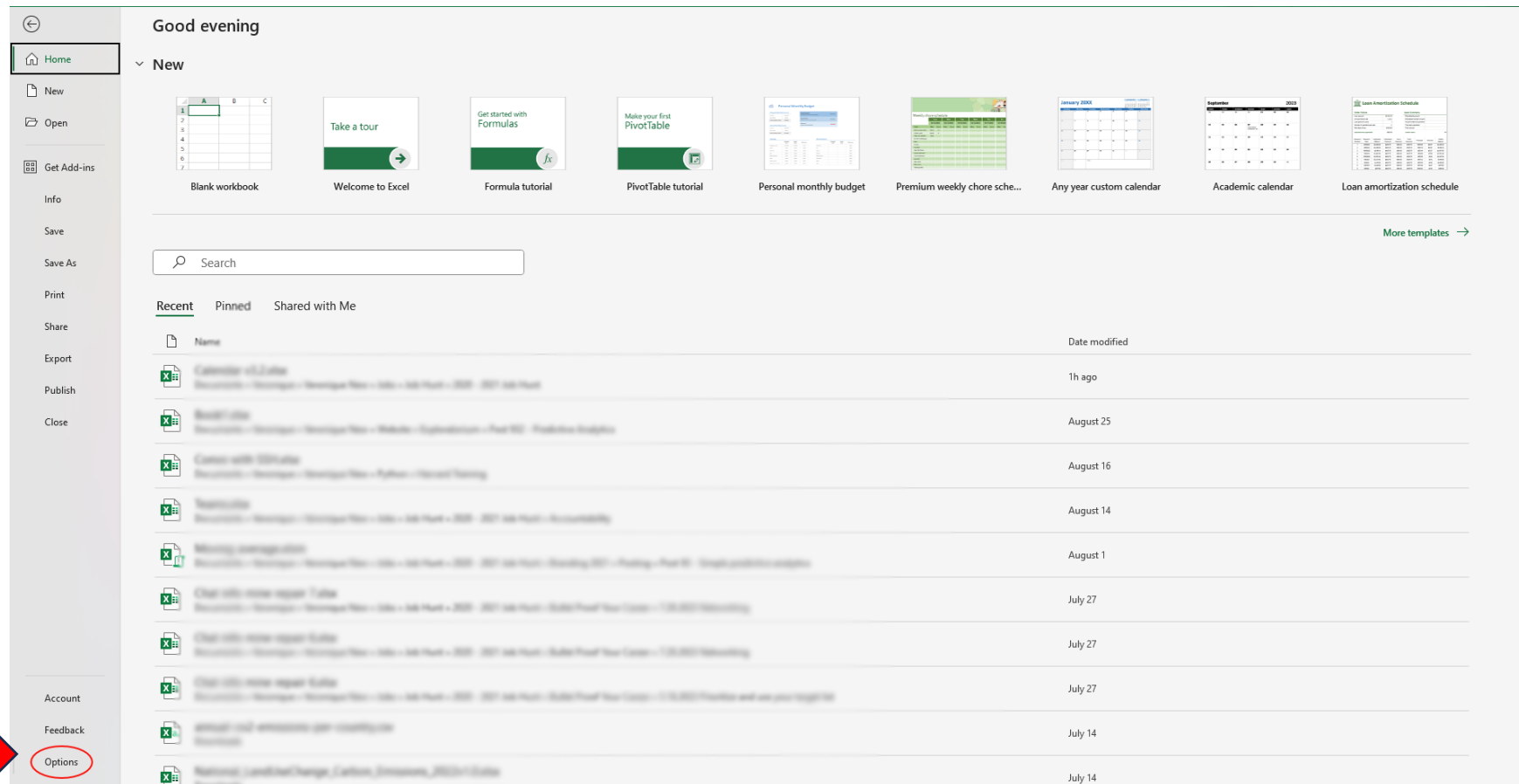


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2																
3		Sum of Sales	Column Labels													
4		Row Labels	January	February	March	April	May	June	August	October	November	December	Grand Total			
5		East	245,796	1,437,687	328,636	332,010		519,985	218,524		464,224		3,546,862			
6		North	484,084			56,449	863,345	435,341		965,761	80,064	554,817	3,439,861			
7		South	378,077	433,720		38,248	579,942	145,803		289,162	812,119	419,041	3,096,112			
8		West		604,619		412,469		64,941		398,297	148,045	412,218	2,040,589			
9		Grand Total	1,107,957	2,476,026	328,636	839,176	1,443,287	1,166,070	218,524	1,653,220	1,504,452	1,386,076	12,123,424			
10																
11																
12																
13																
14																
15																

Let's use East, North, South and West as an example.

Here's a pivot table example where Excel automatically ordered the cardinal directions in alphabetical order. Let's pretend management wants to North, South, East, West as the preferred order.

Go to File and down at bottom on left hand side, select “Options”.

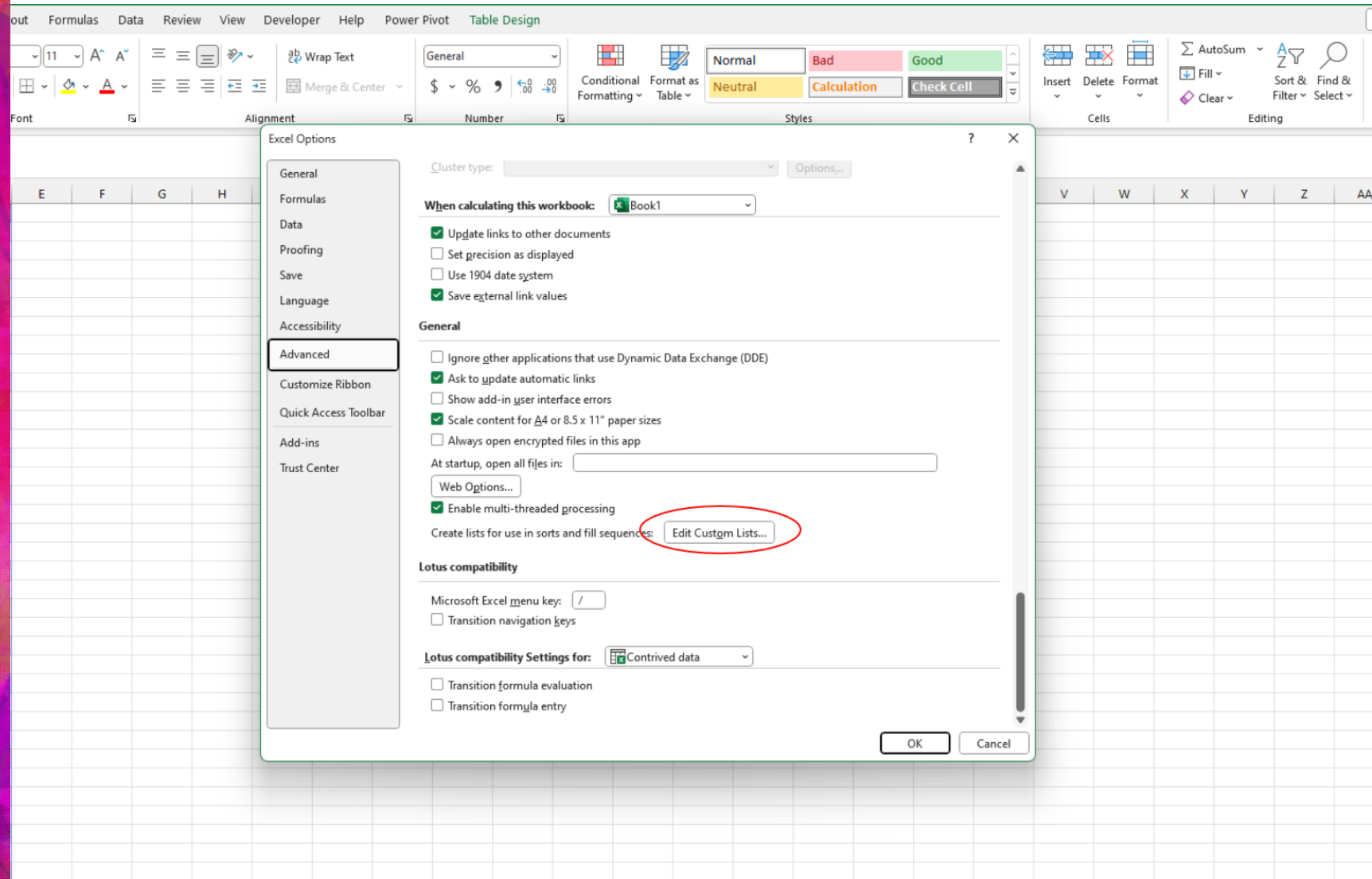


Now go to General or Advanced, depending on your Microsoft version. Mine is Advanced.

The screenshot displays the Microsoft Excel interface with the 'Excel Options' dialog box open. The 'General' tab is selected and circled in red, with a red arrow pointing to it from the text above. The 'Advanced' tab is also circled in red, with another red arrow pointing to it from the text above. The background shows an Excel spreadsheet with columns for Month, Region, and Sales.

Month	Region	Sales
June	South	80,185
January	South	378,077
December	North	147,149
April	South	38,248
December	North	407,668
February	West	101,153
November	North	80,064
December	West	49,804
November	South	249,127
December	West	401,334
June	North	435,341
February	East	20,774
January	East	245,796
October	North	139,205
February	South	433,720
October	South	289,162
February	West	321,448
May	North	486,063
October	North	444,137
April	North	56,449
June	South	65,618
February	West	182,018
November	South	357,845
November	East	464,224
February	East	447,956
October	West	398,297
August	East	63,392
November	West	53,634
June	East	62,590
August	East	155,132
May	North	377,282
December	South	419,041
February	East	398,068
November	South	205,147
May	South	489,158

Scroll down to the very bottom and find “Edit Custom List”.



File Home Insert Draw Page Layout Formulas Data Review View Developer Help Power Pivot Table Design

Clipboard Font Alignment Number Styles Cells Editing Analysis

B2 June

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1		Month	Region	Sales																								
2		June	South	80,185																								
3		January	South	378,077																								
4		December	North	147,149																								
5		April	South	38,248																								
6		December	North	407,668																								
7		February	West	101,153																								
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32		May	North	377,282																								
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35		November	South	205,147																								
36		May	South	489,158																								

Custom Lists

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Custom lists:

- NEW LIST
- Sun, Mon, Tue, Wed, Thu, Fri, Sunday, Monday, Tuesday, We
- Jan, Feb, Mar, Apr, May, Jun, Ji
- January, February, March, Apri

List entries:

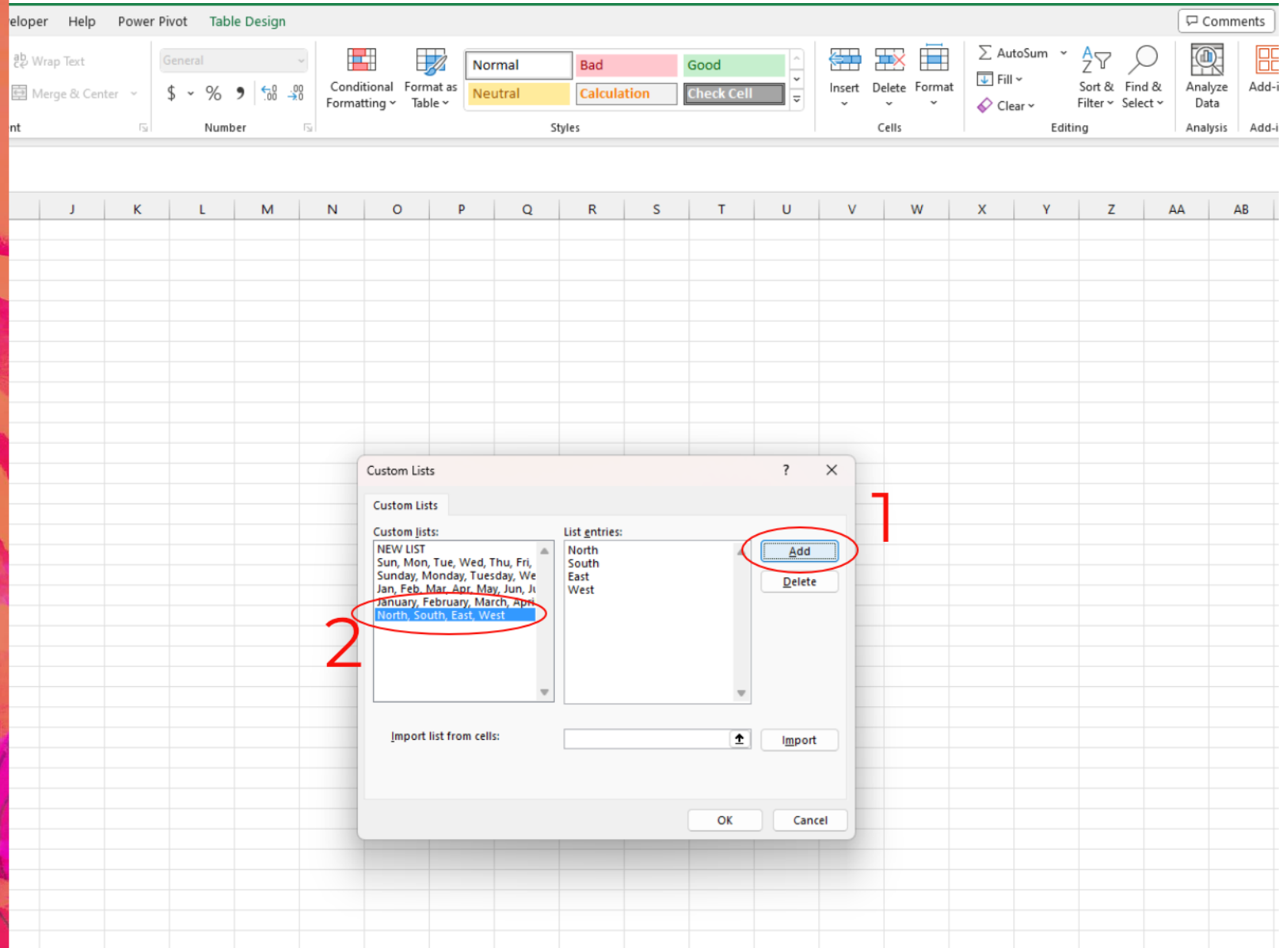
- North
- South
- East
- West

Buttons: Add, Delete, Import, OK, Cancel

Type in your list in the List Entries box.

Finally, click on the 1. Add button to add a new entry in your custom lists.

The new list appears in 2. the Customs List section on the left.



Now, when you create a pivot table, Microsoft will set the order just as instructed in your Custom List.

There is no need to refer to a Customs List; it just happens.

	Column Labels	January	February	March	April	May	June	August	October	November	December	Grand Total
Row Labels	North	484,084			56,449	863,345	435,341		965,761	80,064	554,817	3,439,861
South	South	378,077	433,720		38,248	579,942	145,803		289,162	812,119	419,041	3,096,112
East	East	245,796	1,437,687	328,636	332,010		519,985	218,524		464,224		3,546,862
West	West		604,619		412,469		64,941		398,297	148,045	412,218	2,040,589
Grand Total	Grand Total	1,107,957	2,476,026	328,636	839,176	1,443,287	1,166,070	218,524	1,653,220	1,504,452	1,386,076	12,123,424

No more rearranging the field order to how you want it!

This Custom List
could be a real time
saver for you.

If anything is unclear, you can connect
with me on LinkedIn at:

<https://www.linkedin.com/in/veroniquefrizzell/>