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.

DAY

APRIL

DNESDAY

MARCH

TUESDAY

DAY

BER

SDAY

AUGUST

SUNDAY

ARCH

THURSDA

DECEMBER

TUESDAY

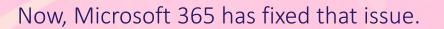
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MONDAY

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That was soooo irksome back in the old days.

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

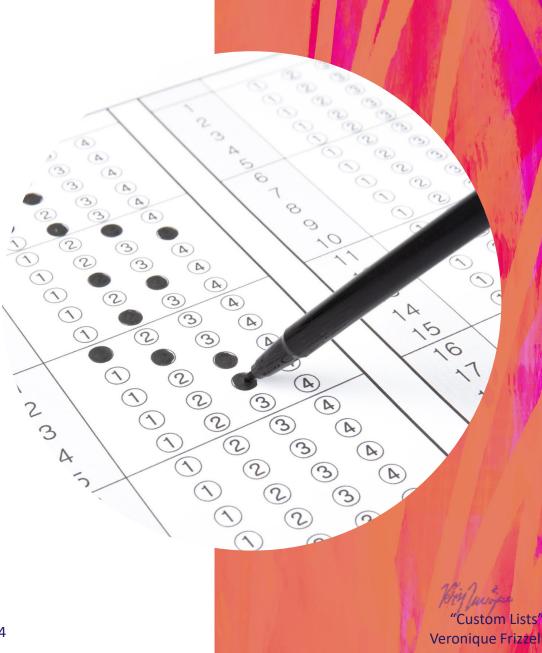


But what if you are not using Office 365?

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.



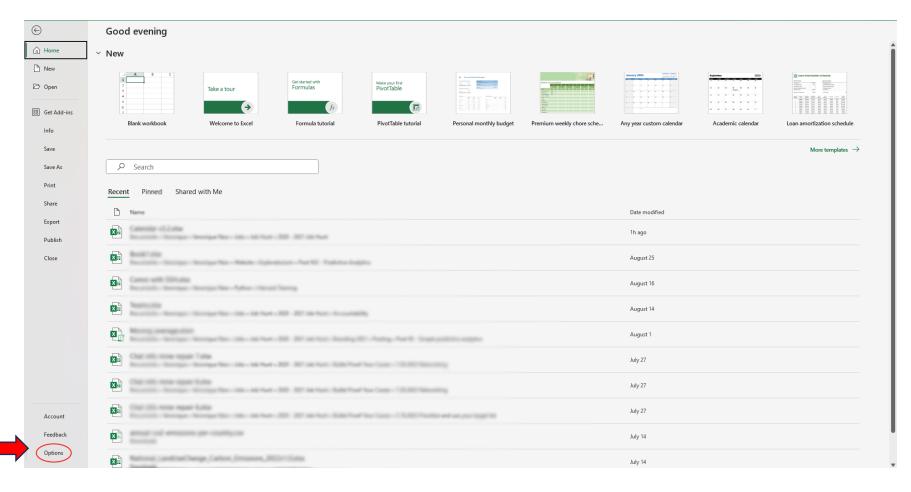
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3		Sum of Sales	Column Labels 💌													
4		Row Labels 💌	January	February	March	April	May	June	August	October	November	December	Grand Total			
5		East	245,796	1,437,687	328,636	332,010		519,985	218,524		464,224		3,546,862			
6		North	484,084			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			
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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.

Custom Lists Veronique Frizzell

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



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

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

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Type in your list in the List Entries box.

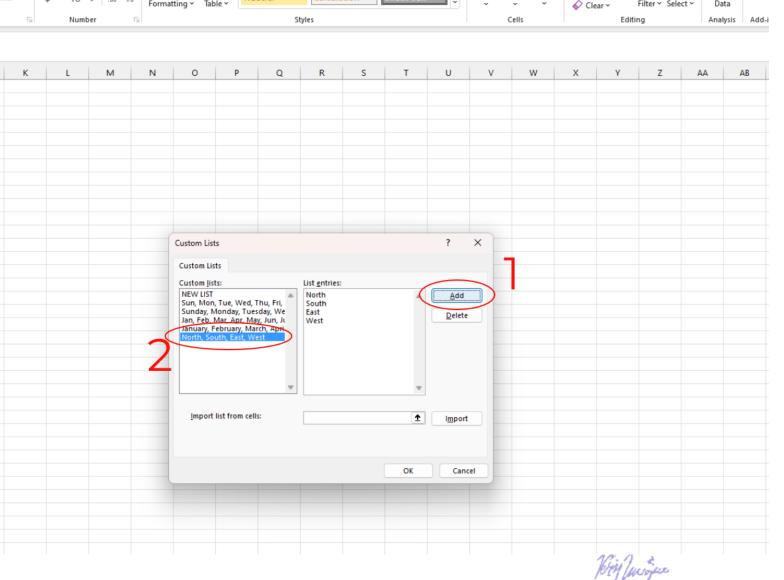
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Finally, click on the 1. Add button to add a new entry in your custom lists.

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



"Custom Lists"

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.

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		North	484,084			56,449	863,345	435,341		965,761	80,064	554,817	3,439,861		
		South	378,077	433,720		38,248	579,942	145,803		289,162	812,119	419,041	3,096,112		
		East	245,796	1,437,687	328,636	332,010		519,985	218,524		464,224		3,546,862		
		West		604,619		412,469		64,941		398,297	148,045	412,218	2,040,589		
		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		
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No more rearranging the field order to how you want it!

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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/