Exercise: Sort and filter data

Note: You can pass this course and all graded assessments without access to the downloadable version of Excel.

How to complete this exercise

To complete this exercise, you will need access to Microsoft 365 Excel.

Note: Keep in mind that if you are using free Office for the web or another version of the Microsoft 365 Excel application some features covered in this exercise may not be available.

Free Office for the web

If you do not have access to Microsoft 365 Excel, you can use Free Office for the web. This version of Office allows you to view and edit files in apps like Word, Excel, and PowerPoint. This free service is available to anyone with a Microsoft account.

Access Microsoft Account

Log in to your Microsoft account. ⧉ Type the email, phone number, or Skype sign-in that you use for other services (Outlook, Office, etc.), then select Next. If you don't have a Microsoft account, you can select No account? Create one!

Let's get started!

You have been asked to present the sales report data by state and to exclude all corporate information. You will use Excel 365 sorting and filtering tools to accomplish these tasks.

1. Click on the link below to open the Microsoft Excel exercise document you can use to complete this exercise.

Exercise: Sort and filter data ⧉

2. Our first task is to sort the data by state. Select cells B2 to B20:

3. Now, click **Home → Sort & Filter → Sort Ascending:**

4. Select Expand the selection in the Sort Warning dialog box and click **Sort**:

Sort Warning

? ✕

Microsoft Excel found data next to your selection. Since you have not selected this data, it will not be sorted.

What do you want to do?
◉ Expand the selection
○ Continue with the current selection

Sort   Cancel

5. Review the results:

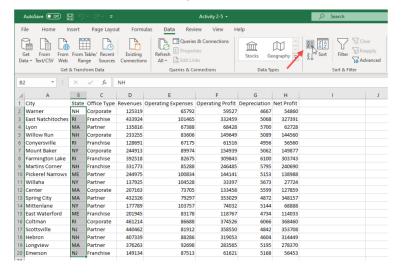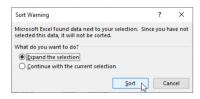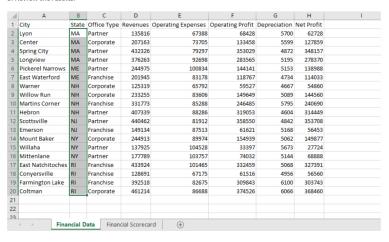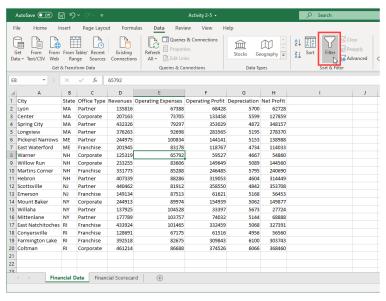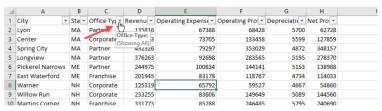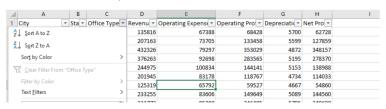|	A	B	C	D	E	F	G	H	I
1	City	State	Office Type	Revenues	Operating Expenses	Operating Profit	Depreciation	Net Profit	
2	Lyon	MA	Partner	135816	67388	68428	5700	62728	
3	Center	MA	Corporate	207163	73705	133458	5599	127859	
4	Spring City	MA	Partner	432326	79297	353029	4872	348157	
5	Longview	MA	Partner	376263	92698	283565	5195	278370	
6	Pickerel Narrows	ME	Partner	244975	100834	144141	5153	138988	
7	East Waterford	ME	Franchise	201945	83178	118767	4734	114033	
8	Warner	NH	Corporate	125319	65792	59527	4667	54860	
9	Willow Run	NH	Corporate	233255	83606	149649	5089	144560	
10	Martins Corner	NH	Franchise	331773	85288	246485	5795	240690	
11	Hebron	NH	Partner	407339	88286	319053	4604	314449	
12	Scottsville	NJ	Partner	440462	81912	358550	4842	353708	
13	Emerson	NJ	Franchise	149134	87513	61621	5168	56453	
14	Mount Baker	NY	Corporate	244913	89974	154939	5062	149877	
15	Willaha	NY	Partner	137925	104528	33397	5673	27724	
16	Mittenlane	NY	Partner	177789	103757	74032	5144	68888	
17	East Natchitoches	RI	Franchise	433924	101465	332459	5068	327391	
18	Conyersville	RI	Franchise	128691	67175	61516	4956	56560	
19	Farmington Lake	RI	Franchise	392518	82675	309843	6100	303743	
20	Coltman	RI	Corporate	461214	86688	374526	6066	368460	

Financial Data   Financial Scorecard

6. Now we want to filter out the corporate data. Select any cell within the data and click **Data → Filter**:

7. Click the drop-down arrow in cell C1 (Office Type):

	A	B	C	D	E	F	G	H	I
1	City	Sta	Office Typ	Revenu	Operating Expens	Operating Pro	Depreciati	Net Pro	
2	Lyon	MA	Partner	135816	67388	68428	5700	62728	
3	Center	MA	Corporate		73705	133458	5599	127859	
4	Spring City	MA	Partner	432326	79297	353029	4872	348157	
5	Longview	MA	Partner	376263	92698	283565	5195	278370	
6	Pickerel Narrows	ME	Partner	244975	100834	144141	5153	138988	
7	East Waterford	ME	Franchise	201945	83178	118767	4734	114033	
8	Warner	NH	Corporate	125319	65792	59527	4667	54860	
9	Willow Run	NH	Corporate	233255	83606	149649	5089	144560	
10	Martins Corner	NH	Franchise	331773	85288	246485	5795	240690	

Office Type:
(Showing All)

8. Click in the checkbox next to Corporate to deselect, then click **OK**:

	A	B	C	D	E	F	G	H	I
1	City	Sta	Office Type	Revenu	Operating Expens	Operating Pro	Depreciati	Net Pro	
	↓ Sort A to Z			135816	67388	68428	5700	62728	
				207163	73705	133458	5599	127859	
	↓ Sort Z to A			432326	79297	353029	4872	348157	
	Sort by Color		>	376263	92698	283565	5195	278370	
				244975	100834	144141	5153	138988	
	Clear Filter From "Office Type"			201945	83178	118767	4734	114033	
	Filter by Color		>	125319	65792	59527	4667	54860	
	Text Filters		>	233255	83606	149649	5089	144560	

9. Review the results, and note the AutoFilter icon in cell C1, the blue row numbers, and the double lines indicating the hidden cells:

	A	B	C	D	E	F	G	H	I
1	City	Sta	Office Type	Revenu	Operating Expens	Operating Pro	Depreciati	Net Pro	
2	Lyon	MA	Partner	135816	67388	68428	5700	62728	
4	Spring City	MA	Partner	432326	79297	353029	4872	348157	
5	Longview	MA	Partner	376263	92698	283565	5195	278370	
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19	Farmington Lake	RI	Franchise	392518	82675	309843	6100	303743	
21									
22									

10. Save your workbook as Activity 2-5 Complete. Close Microsoft 365 Excel to complete this activity.

11. Now, you can check out an example of a completed document in the link below:

Completed exercise: Sort and filter data ↗

Mark as completed

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