CREATING A PIVOT TABLE FOR CONTINUATION BUDGET

Create a pivot table with your data (Data tab) by selecting cell A1, click the “Insert” tab, and click “Pivot Table” on the left side of the menu bar. Drag the following fields into the grid below as shown (note that “SBS2” will appear after the grouping procedure below):

In the pivot table:

Group account codes by revenue & expenditure

1. Highlight all revenue SBS codes (10XXX)
2. Right click
   a. Choose “Group”
3. Highlight all expenditure SBS codes (7XXXX)
4. Right click
   a. Choose “Group”

To sum the groups:
1. Left click on SBS2 box in pivot table
   a. Go to field settings
   b. Click “Automatic” in Subtotals & Filters Tab
   c. Click OK

All screenshots show Microsoft Excel 2013 in default layout.
All screenshots show Microsoft Excel 2013 in default layout.