

How can I group data by quarter in Excel?

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June 23, 2024

RECOMMENDED CITATION

stats writer (2024). *How can I group data by quarter in Excel?*. PSYCHOLOGICAL SCALES.
Retrieved from <https://scales.arabpsychology.com/?p=147378>

Grouping data by quarter in Excel is a useful method for organizing and analyzing large sets of data. This process involves grouping data into four quarters based on a particular date or time period. To do this, one can use the "Group" function in the "Data" tab, which allows for the creation of specific groupings by selecting the desired time period. This feature is helpful for identifying patterns and trends in data over a specific time frame, such as quarterly sales or expenses. It also allows for easier comparison and visualization of data, making it a valuable tool for businesses and individuals looking to efficiently manage and analyze their data in Excel.

Group Data by Quarter in Excel (With Example)

Often you may want to group data by quarter in Excel.

Fortunately this is easy to do using the pivot table Group function.

The following example shows how to use this function in practice.

Example: Group by Quarter in Excel

Suppose we have the following dataset in Excel that shows the total sales made by some company during various days:

	A	B	C	D	E
1	Date	Sales			
2	1/12/2021	6			
3	1/14/2021	5			
4	5/15/2022	5			
5	6/25/2022	10			
6	2/3/2021	12			
7	9/5/2022	5			
8	12/10/2022	3			
9	3/1/2021	4			
10	10/14/2021	5			
11	11/22/2022	6			
12	3/24/2022	1			
13					
14					
15					
16					
17					
18					

To group the sales by quarter, we must first create a pivot table.

Highlight the cells in the range A1:B12, then click the Insert tab along the top ribbon, then click PivotTable.

In the new window that appears, we'll choose to insert the Pivot Table in cell D1 of the current worksheet:

	A	B	C	D	E	F	G	H	I
1	Date	Sales							
2	1/12/2021	6							
3	1/14/2021	5							
4	5/15/2022	5							
5	6/25/2022	10							
6	2/3/2021	12							
7	9/5/2022	5							
8	12/10/2022	3							
9	3/1/2021	4							
10	10/14/2021	5							
11	11/22/2022	6							
12	3/24/2022	1							
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									

PivotTable from table or range

Select a table or range

Table/Range: Sheet1!\$A\$1:\$B\$12

Choose where you want the PivotTable to be placed

New Worksheet

Existing Worksheet

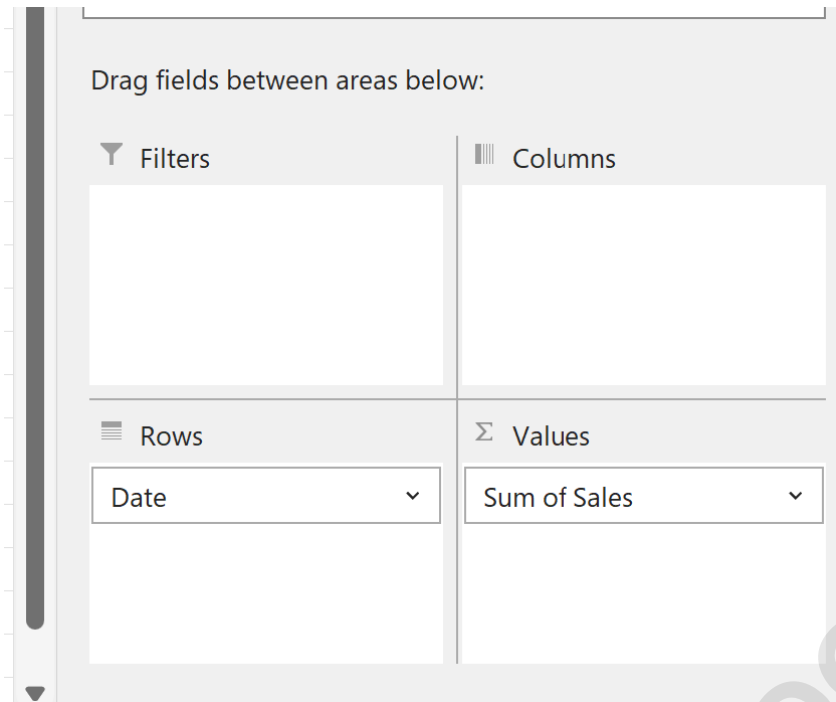
Location: Sheet1!\$D\$1

Choose whether you want to analyze multiple tables

Add this data to the Data Model

OK Cancel

In the window that appears on the right side of the screen, drag Date to Rows and Sales to Values:

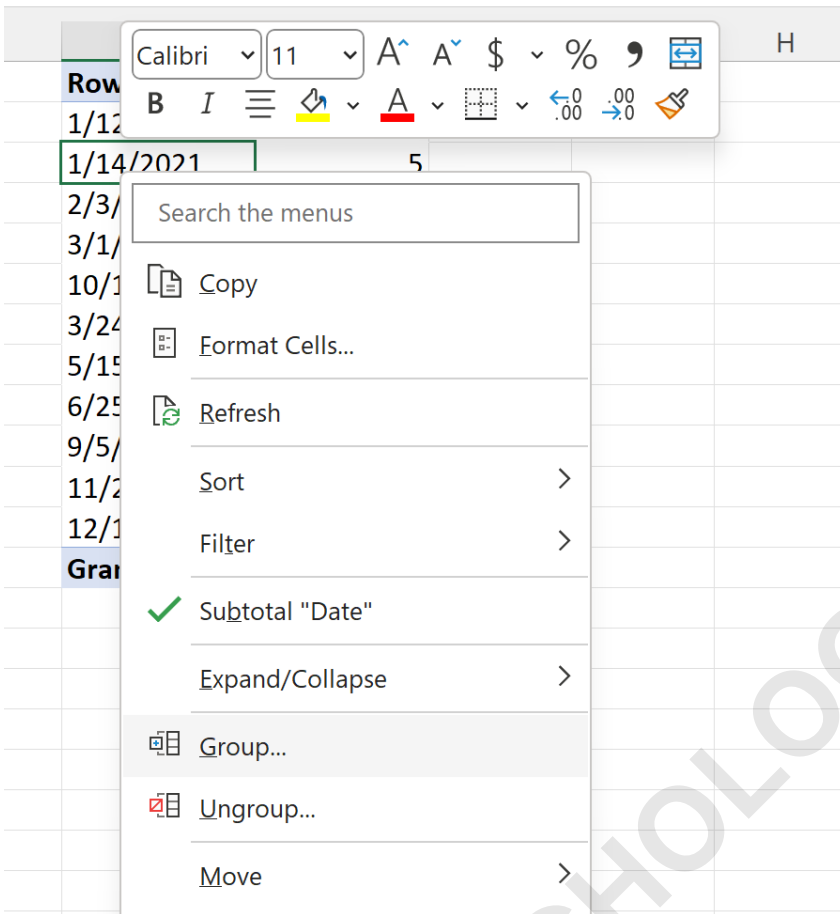


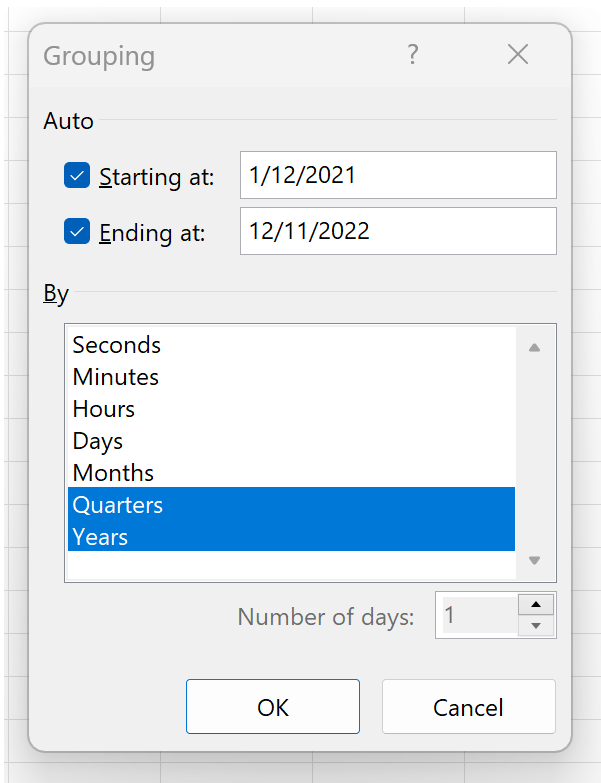
The following pivot table will automatically be populated:

	A	B	C	D	E	F
1	Date	Sales		Row Labels ▾	Sum of Sales	
2	1/12/2021	6		1/12/2021	6	
3	1/14/2021	5		1/14/2021	5	
4	5/15/2022	5		2/3/2021	12	
5	6/25/2022	10		3/1/2021	4	
6	2/3/2021	12		10/14/2021	5	
7	9/5/2022	5		3/24/2022	1	
8	12/10/2022	3		5/15/2022	5	
9	3/1/2021	4		6/25/2022	10	
10	10/14/2021	5		9/5/2022	5	
11	11/22/2022	6		11/22/2022	6	
12	3/24/2022	1		12/10/2022	3	
13				Grand Total	62	
14						
15						
16						
17						
18						

To group the data by quarter, right click on any of the dates in the pivot table.

Then click Group in the dropdown menu.





The sales in the pivot table will automatically be grouped by quarter and year:

	A	B	C	D	E	F
1	Date	Sales		Row Labels ▼	Sum of Sales	
2	1/12/2021	6		2021	32	
3	1/14/2021	5		Qtr1	27	
4	5/15/2022	5		Qtr4	5	
5	6/25/2022	10		2022	30	
6	2/3/2021	12		Qtr1	1	
7	9/5/2022	5		Qtr2	15	
8	12/10/2022	3		Qtr3	5	
9	3/1/2021	4		Qtr4	9	
10	10/14/2021	5		Grand Total	62	
11	11/22/2022	6				
12	3/24/2022	1				
13						
14						
15						
16						
17						

We can now see the sum of sales, grouped by quarter and year.

Note: If you would like to only group by quarter and ignore the years, then only click the Quarter option in the Grouping window.

The following tutorials explain how to perform other common tasks in Excel: