

How do I calculate the sum by quarter in Excel?

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Calculating the sum by quarter in Excel refers to the process of finding the total value of a set of data, grouped by quarters, using the Microsoft Excel software. This can be achieved by using the SUM function, which allows for the addition of a specific range of cells, or by using the AutoSum feature, which automatically calculates the sum of selected cells. By organizing data into quarters, users can easily analyze and compare data trends over a specific time period. This feature is helpful for financial data, sales reports, and other types of data that are commonly tracked by quarter. To calculate the sum by quarter in Excel, users can follow a few simple steps, such as selecting the data set, grouping it by quarters, and then using the SUM function or AutoSum feature to find the total value for each quarter.

Sum by Quarter in Excel (Step-by-Step Example)

Often you may want to sum the values of some dataset in Excel based on quarter.

For example, suppose we have the following dataset and we'd like to sum the total sales by quarter:

	A	B	C	D	E	F
1	Date	Sales				
2	1/2/2022	30				
3	1/4/2022	12				
4	2/15/2022	15				
5	3/22/2022	14				
6	4/19/2022	13				
7	6/12/2022	25				
8	8/14/2022	25				
9	8/15/2022	26				
10	9/2/2022	39				
11	9/15/2022	40				
12	10/31/2022	23				
13	12/20/2022	29				
14	12/24/2022	14				
15						
16						
17						
18						
19						
20						
21						
22						

The following step-by-step example shows how to do so.

Step 1: Enter the Data

First, enter the data values into Excel:

	A	B	C	D	E	F
1	Date	Sales				
2	1/2/2022	30				
3	1/4/2022	12				
4	2/15/2022	15				
5	3/22/2022	14				
6	4/19/2022	13				
7	6/12/2022	25				
8	8/14/2022	25				
9	8/15/2022	26				
10	9/2/2022	39				
11	9/15/2022	40				
12	10/31/2022	23				
13	12/20/2022	29				
14	12/24/2022	14				
15						
16						
17						
18						
19						
20						
21						
22						

Step 2: Enter the Quarters

Next, we'll manually create a list of the four quarters in a new column:

	A	B	C	D	E	F
1	Date	Sales		Quarter		
2	1/2/2022	30		1		
3	1/4/2022	12		2		
4	2/15/2022	15		3		
5	3/22/2022	14		4		
6	4/19/2022	13				
7	6/12/2022	25				
8	8/14/2022	25				
9	8/15/2022	26				
10	9/2/2022	39				
11	9/15/2022	40				
12	10/31/2022	23				
13	12/20/2022	29				
14	12/24/2022	14				
15						
16						
17						
18						
19						
20						
21						
22						

Step 3: Calculate the Sum by Quarter

Next, we'll type the following formula into cell E2 to calculate the sum of sales for the first quarter:

```
=SUMPRODUCT((ROUNDUP(MONTH($A$2:$A$14)/3,0)=D2)*$B$2:$B$14)
```

We'll then drag and fill this formula down to the remaining cells in column E:

E2 \times \checkmark fx =SUMPRODUCT((ROUNDUP(MONTH(\$A\$2:\$A\$14

	A	B	C	D	E	F	G
1	Date	Sales		Quarter	Sum of Sales		
2	1/2/2022	30		1	71		
3	1/4/2022	12		2	38		
4	2/15/2022	15		3	130		
5	3/22/2022	14		4	66		
6	4/19/2022	13					
7	6/12/2022	25					
8	8/14/2022	25					
9	8/15/2022	26					
10	9/2/2022	39					
11	9/15/2022	40					
12	10/31/2022	23					
13	12/20/2022	29					
14	12/24/2022	14					
15							
16							
17							
18							
19							
20							
21							
22							
23							

From the output we can see:

There were 71 total sales made in the first quarter. There were 38 total sales made in the second quarter. There were 130 total sales made in the third quarter. There were 66 total sales made in the fourth quarter.

For example, the total sales in the first quarter (January, February, March) can be calculated as:

First Quarter Sales: $30 + 12 + 15 + 14 = 71$

This matches the value calculated by our formula.

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

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