

# How do I sum values in Excel by month and year?

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## The Challenge of Date-Based Aggregation in Excel

When analyzing time-series data, a common requirement is to aggregate numerical values based on specific temporal dimensions, such as the month and year. Standard summation techniques in Excel typically calculate totals across an entire range, but to derive meaningful business insights, we often need a more granular view. Grouping data by month and year allows financial analysts, sales managers, and operational teams to identify seasonal trends, monitor performance fluctuations, and make informed forecasting decisions.

This process presents a unique challenge because Excel stores dates as sequential serial numbers. To sum values based on the month and year, we first need to isolate and standardize these components from the full date format. The objective is to create a criterion field that matches the desired time period perfectly, enabling a conditional summation function to operate effectively.

Consider a typical dataset tracking sales transactions. We have a column for the transaction date and a corresponding column for the sales amount. Our goal is to quickly generate a summary table showing the total sales generated within January 2022, May 2022, and any other distinct month/year combination present in the data. The subsequent steps detail a robust and reusable methodology using core Excel formulas to achieve this sophisticated aggregation.

### Setting Up the Dataset and Initial Data Entry

The foundation of any successful data analysis project in Excel is accurately structured input data. For this example, we assume our raw data is organized into two primary columns: the transaction date and the corresponding sales value. It is crucial to ensure that the Date column is formatted correctly as a Date type within Excel, although the methods we are about to employ will convert this serial number representation into a readable text string for aggregation purposes.

We begin by entering the raw data into columns A and B, starting at row 2, with appropriate headings in row 1 (e.g., "Date" and "Sales"). This initial setup is vital, as all subsequent formulas will rely on these defined ranges.

The visual representation below illustrates the required setup, showing the Date (Column A) and Sales (Column B) figures that we aim to summarize by temporal groupings.

	A	B	C	D	E	F
1	<b>Date</b>	<b>Sales</b>				
2	1/1/2022	14				
3	1/14/2022	19				
4	5/10/2022	22				
5	5/15/2022	38				
6	6/1/2022	20				
7	8/13/2022	14				
8	8/16/2022	18				
9	8/20/2022	15				
10	2/5/2023	10				
11	2/10/2023	12				
12	3/14/2023	12				
13	5/19/2023	18				
14	5/22/2023	10				
15	5/27/2023	11				
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## The Crucial Role of Date Formatting: Extracting Month and Year

Since we cannot directly sum based on the full date (as a full date is unique), we must create a helper column that extracts a consistent representation of the month and year combination. This standardized string will serve as the criteria for our conditional summation. The most effective tool for this conversion is the TEXT function, which converts a value to a text format using specified number formatting codes.

In cell **C2**, adjacent to our first date entry, we input the formula below. This formula targets the date in **A2** and applies the custom format "mmm yyyy". The "mmm" code represents the three-letter abbreviation for the month (e.g., Jan, May), and "yyyy" represents the four-digit year (e.g., 2022). This combination ensures that we create a unique string identifier for each month/year period.

**=TEXT(A2, "mmm yyyy")**

## Understanding the TEXT Function and its Syntax

The TEXT function requires two arguments: the value you wish to format (in our case, the cell

reference **A2** containing the date serial number) and the format code (enclosed in quotation marks). Selecting the correct format code is paramount for success in this scenario.

We specifically chose "mmm yyyy" because it provides a consistent, standardized string that is easily readable and distinct for each period. If we had used "m/yyyy", the output would be a numerical string like "1/2022," which might be confused with actual division if not handled carefully. The combination of abbreviated month name and four-digit year (e.g., "Jan 2022") guarantees clarity and prevents ambiguity during the matching phase.

After entering the formula in **C2**, we must apply it to the entire range of data. By clicking and dragging the fill handle down to the last row of our dataset (in this case, C15), Column C populates with the extracted month and year strings. This helper column is now ready to be utilized as the range against which our criteria will be matched during the summation phase.

	A	B	C	D	E	F
1	<b>Date</b>	<b>Sales</b>	<b>Month &amp; Year</b>			
2	1/1/2022	14	Jan 2022			
3	1/14/2022	19	Jan 2022			
4	5/10/2022	22	May 2022			
5	5/15/2022	38	May 2022			
6	6/1/2022	20	Jun 2022			
7	8/13/2022	14	Aug 2022			
8	8/16/2022	18	Aug 2022			
9	8/20/2022	15	Aug 2022			
10	2/5/2023	10	Feb 2023			
11	2/10/2023	12	Feb 2023			
12	3/14/2023	12	Mar 2023			
13	5/19/2023	18	May 2023			
14	5/22/2023	10	May 2023			
15	5/27/2023	11	May 2023			
16						
17						

## Identifying Distinct Time Periods using the UNIQUE Function

Before calculating the conditional sums, we need a definitive list of all the unique month/year combinations present in our data. This unique list will serve as our summary report's criteria column. Manually identifying these periods can be time-consuming and error-prone, especially with

large data volumes. Fortunately, modern versions of Excel provide the dynamic array UNIQUE function, which automatically filters a range to return only distinct values.

We start our summary report in Column E. In cell **E2**, we input the formula specifying the range of our helper column (Column C) created in the previous step. This function dynamically spills the results down the column, ensuring our criteria list is exhaustive and contains every unique time period for which we have sales data.

**=UNIQUE(C2:C15)**

The result of this single formula application is a clean, organized list of all periods (e.g., Jan 2022, May 2022, Jun 2022) we need to report on. Crucially, because this is a dynamic array formula, if new data is added to the source columns (A, B, and C), the unique list in column E will automatically update, making this a highly efficient and scalable solution.

	A	B	C	D	E	F
1	<b>Date</b>	<b>Sales</b>	<b>Month &amp; Year</b>		<b>Unique Month &amp; Years</b>	
2	1/1/2022	14	Jan 2022		Jan 2022	
3	1/14/2022	19	Jan 2022		May 2022	
4	5/10/2022	22	May 2022		Jun 2022	
5	5/15/2022	38	May 2022		Aug 2022	
6	6/1/2022	20	Jun 2022		Feb 2023	
7	8/13/2022	14	Aug 2022		Mar 2023	
8	8/16/2022	18	Aug 2022		May 2023	
9	8/20/2022	15	Aug 2022			
10	2/5/2023	10	Feb 2023			
11	2/10/2023	12	Feb 2023			
12	3/14/2023	12	Mar 2023			
13	5/19/2023	18	May 2023			
14	5/22/2023	10	May 2023			
15	5/27/2023	11	May 2023			
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## Performing Conditional Summation with the SUMIF Function

With our criteria (unique month/year strings in Column E) and our criteria range (extracted strings in Column C) established, we are now ready to perform the conditional summation to calculate the total sales for each period. The SUMIF function is perfectly suited for this task, as it sums values in

a specified range based on a single condition.

The structure of the SUMIF function requires three arguments: the range to check the criteria against (the criteria range), the criteria itself, and the range containing the values to sum (the sum range). We input the following formula into cell **F2**, next to our first unique period:

**=SUMIF(\$C\$2:\$C\$15, E2, \$B\$2:\$B\$15)**

Note the use of **absolute references** (the dollar signs, e.g., \$C\$2:\$C\$15) for both the criteria range (Column C) and the sum range (Column B). This is a critical step because when we drag the formula down, we want these source ranges to remain fixed. However, the criteria reference (E2) must remain **relative** so that it adjusts dynamically to E3, E4, and so on, matching the calculation to the specific unique period in each row.

After applying the formula in **F2**, we use the fill handle to drag it down through the rest of Column F. Excel efficiently checks every cell in the criteria range (\$C\$2:\$C\$15) against the criteria in the corresponding row (e.g., E2, which is "Jan 2022") and sums up the associated sales values from the sum range (\$B\$2:\$B\$15).

	A	B	C	D	E	F
1	<b>Date</b>	<b>Sales</b>	<b>Month &amp; Year</b>		<b>Unique Month &amp; Years</b>	<b>Sum by Month &amp; Year</b>
2	1/1/2022	14	Jan 2022		Jan 2022	33
3	1/14/2022	19	Jan 2022		May 2022	60
4	5/10/2022	22	May 2022		Jun 2022	20
5	5/15/2022	38	May 2022		Aug 2022	47
6	6/1/2022	20	Jun 2022		Feb 2023	22
7	8/13/2022	14	Aug 2022		Mar 2023	12
8	8/16/2022	18	Aug 2022		May 2023	39
9	8/20/2022	15	Aug 2022			
10	2/5/2023	10	Feb 2023			
11	2/10/2023	12	Feb 2023			
12	3/14/2023	12	Mar 2023			
13	5/19/2023	18	May 2023			
14	5/22/2023	10	May 2023			
15	5/27/2023	11	May 2023			
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## Analyzing the Results and Practical Applications

The final output in Column F provides a clear, aggregated view of the total sales performance categorized strictly by month and year. This transformation from raw transactional data into structured summary information is invaluable for various reporting and analytical needs.

From the resulting summary table, we can immediately draw distinct conclusions about the temporal distribution of sales:

There were **33** total sales made in January 2022.

There were **60** total sales made in May 2022.

There were **20** total sales made in June 2022.

This method allows users to easily visualize trends, identify peak selling seasons, and spot unusual dips in performance. The structure created here can also form the basis for charts and graphs, providing visual context to the numerical summaries.

## Alternative Methods for Aggregation (Pivot Tables and SUMIFS)

While the combination of TEXT, UNIQUE, and SUMIF provides an excellent, transparent, formula-driven solution, users should be aware of alternative, potentially more advanced methods for similar aggregation tasks in Excel.

For large and complex datasets, using a Pivot Table is often the most efficient route. Pivot Tables allow users to drag the Date field into the Rows area, where Excel automatically groups the dates (a feature known as grouping by time). This requires less manual setup and eliminates the need for the helper column created using the TEXT function, offering superior performance and flexibility, especially when needing to summarize data across multiple dimensions simultaneously (e.g., month, year, and product category).

Additionally, if the requirement was to sum values based on multiple criteria--for example, summing sales by month, year, and region--the SUMIFS function would be necessary. While SUMIF handles a single criteria (the month/year string) elegantly, SUMIFS is essential when needing to check the extracted month/year string AND another condition simultaneously. Understanding these alternative tools ensures you can select the most appropriate method for any given data challenge, maximizing efficiency and accuracy.

The formula-based approach detailed here remains valuable for scenarios where creating a Pivot Table is not feasible, or when the calculation needs to be embedded within a more complex formula structure in a reporting dashboard.