

Advanced Filter

1 Version Control

<i>Version</i>	<i>Summary</i>	<i>Date</i>	<i>Editor</i>
0.1	Advanced Filter	30/09/2021	Mainak Roy

2 Table of Contents

- 1 Version Control..... 2
- 2 Table of Contents 3
- 4. Advanced Filter 4
 - 4.1And Criteria 4
 - 4.2Or Criteria 5
 - 4.3Formula as Criteria 6

4. Advanced Filter

This example teaches you how to apply an advanced filter in Excel to only display records that meet complex criteria.

When you use the Advanced Filter, you need to enter the criteria on the worksheet. Create a Criteria range (blue border below for illustration only) above your data set. Use the same column headers. Be sure there's at least one blank row between your Criteria range and data set.

4.1 And Criteria

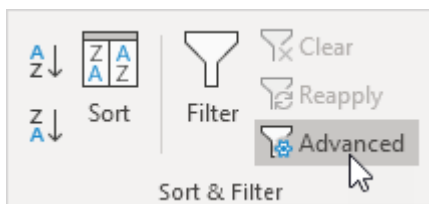
To display the sales in the USA and in Qtr 4, execute the following steps.

1. Enter the criteria shown below on the worksheet.

	A	B	C	D	E
1	Last Name	Sales	Country	Quarter	
2			USA	Qtr 4	
3					
4					
5	Last Name	Sales	Country	Quarter	
6	Smith	\$16,753.00	UK	Qtr 3	
7	Johnson	\$14,808.00	USA	Qtr 4	
8	Williams	\$10,644.00	UK	Qtr 2	
9	Jones	\$1,390.00	USA	Qtr 3	
10	Brown	\$4,865.00	USA	Qtr 4	
11	Williams	\$12,438.00	UK	Qtr 1	
12	Johnson	\$9,339.00	UK	Qtr 2	
13	Smith	\$18,919.00	USA	Qtr 3	
14	Jones	\$9,213.00	USA	Qtr 4	
15	Jones	\$7,433.00	UK	Qtr 1	
16	Brown	\$3,255.00	USA	Qtr 2	
17	Williams	\$14,867.00	USA	Qtr 3	
18	Williams	\$19,302.00	UK	Qtr 4	
19	Smith	\$9,698.00	USA	Qtr 1	
20					

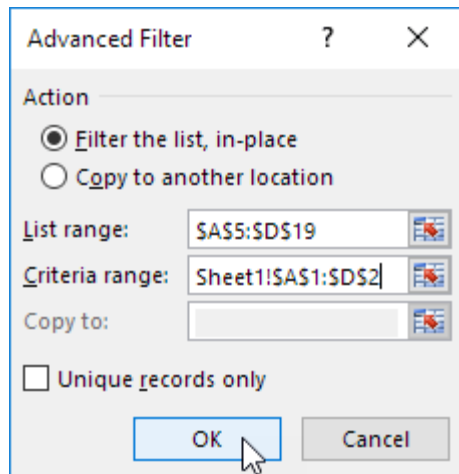
2. Click any single cell inside the data set.

3. On the Data tab, in the Sort & Filter group, click Advanced.



4. Click in the Criteria range box and select the range A1:D2 (blue).

5. Click OK.



Advanced Filter

Action

☒ Filter the list, in-place

☐ Copy to another location

List range: \$A\$5:\$D\$19

Criteria range: Sheet1!\$A\$1:\$D\$2

Copy to:

☐ Unique records only

OK Cancel

Notice the options to copy your filtered data set to another location and display unique records only (if your data set contains duplicates).

Result.

	A	B	C	D	E
1	Last Name	Sales	Country	Quarter	
2			USA	Qtr 4	
3					
4					
5	Last Name	Sales	Country	Quarter	
7	Johnson	\$14,808.00	USA	Qtr 4	
10	Brown	\$4,865.00	USA	Qtr 4	
14	Jones	\$9,213.00	USA	Qtr 4	
20					

No rocket science so far. We can achieve the same result with the normal filter. We need the Advanced Filter for Or criteria.

4.2Or Criteria

To display the sales in the USA in Qtr 4 or in the UK in Qtr 1, execute the following steps.

6. Enter the criteria shown below on the worksheet.

7. On the Data tab, in the Sort & Filter group, click Advanced, and adjust the Criteria range to range A1:D3 (blue).

8. Click OK.

Advanced Filter ? X

Action

☒ Filter the list, in-place
☐ Copy to another location

List range: \$A\$5:\$D\$19

Criteria range: Sheet1!\$A\$1:\$D\$3

Copy to:

☐ Unique records only

OK Cancel

Result.

	A	B	C	D	E
1	Last Name	Sales	Country	Quarter	
2			USA	Qtr 4	
3			UK	Qtr 1	
4					
5	Last Name	Sales	Country	Quarter	
7	Johnson	\$14,808.00	USA	Qtr 4	
10	Brown	\$4,865.00	USA	Qtr 4	
11	Williams	\$12,438.00	UK	Qtr 1	
14	Jones	\$9,213.00	USA	Qtr 4	
15	Jones	\$7,433.00	UK	Qtr 1	
20					

4.3 Formula as Criteria

To display the sales in the USA in Qtr 4 greater than \$10,000 or in the UK in Qtr 1, execute the following steps.

9. Enter the criteria (+formula) shown below on the worksheet.

10. On the Data tab, in the Sort & Filter group, click Advanced, and adjust the Criteria range to range A1:E3 (blue).

11. Click OK.

Advanced Filter ? X

Action

☒ Filter the list, in-place
☐ Copy to another location

List range: \$A\$5:\$D\$19

Criteria range: Sheet1!\$A\$1:\$E\$3

Copy to:

☐ Unique records only

OK Cancel

Result.

	A	B	C	D	E	F
1	Last Name	Sales	Country	Quarter		
2			USA	Qtr 4	TRUE	
3			UK	Qtr 1		
4						
5	Last Name	Sales	Country	Quarter		
7	Johnson	\$14,808.00	USA	Qtr 4		
11	Williams	\$12,438.00	UK	Qtr 1		
15	Jones	\$7,433.00	UK	Qtr 1		
20						

Note: always place a formula in a new column. Do not use a column label or use a column label that is not in your data set. Create a relative reference to the first cell in the column (B6). The formula must evaluate to TRUE or FALSE.