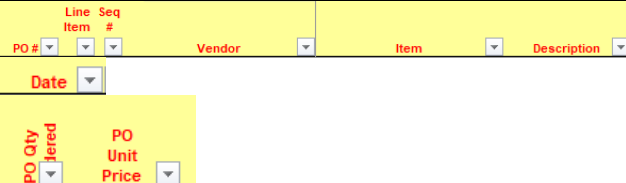
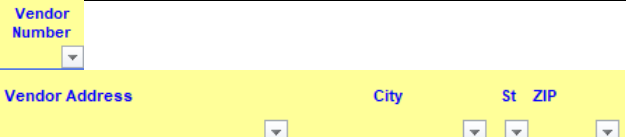





Request from Swain County	
Hey Paige, I have a public information request for PO's and I am having trouble getting data they are requesting on one pivot table. Can you help me?	
From PO Details I need the following:	
From Purchase Orders I need the following:	
<p>PO# Date Line Item Description Line Item Quantity Line Item Price Vendor # Vendor Name Vendor Address</p> <p>Date range needs to be from 1/1/13 to current</p>	
<p>Refresh Purchase Orders spreadsheet for each year that the customer needs data for and save each year with a unique name.</p> <p>Next, get a starting point by saving the first year's spreadsheet with another new unique name. Use this spreadsheet to combine all the data together for the requested report.</p>	<p>Ex:</p> <ul style="list-style-type: none">  Copy of Sartox Purchase Orders with Details Jan 01 2013 - June 30 2013.xlsxm  Copy of Sartox Purchase Orders with Details July 01 2013 - June 30 2014.xlsxm  Copy of Sartox Purchase Orders with Details July 01 2014 - June 30 2015.xlsxm <p style="text-align: center; font-style: italic;">Copy of Sartox Purchase Orders with Details Refreshed for Jan 2013 to Oct 13 2017.xlsxm</p>

Close all the spreadsheets that were refreshed for each year. Only have open the one that is going to contain the combined information. This would be the one that was just saved. For this documentation purpose – this spreadsheet will be referred to as – the combined spreadsheet.

Step 1:

Staying in that same instance of Excel, open one of the spreadsheets for another year.

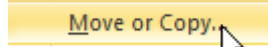
In the combine spreadsheet be sure to unhide all columns on **both** the Purchase Orders tab **and** the Details tab. In the newly open spreadsheet, be sure to unhide all columns on **both** the Purchase Orders tab **and** the Details tab.



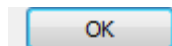
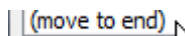
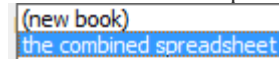
click between the A and the 1 Home tab, format, Hide & Unhide, Unhide Columns

Then copy the Purchase Orders tab from the newly opened spreadsheet to the combined spreadsheet.

Right click on the Purchase Orders tab and select



Select the combine spreadsheet




On this tab – Purchase Orders (2), unhide all columns – this will be the name of the tab that was just copied into this spreadsheet

Copy all the rows on this tab.

Go to the Purchase Order tab and paste these rows at the bottom of the current data.



click between the A and the 1 Home tab, format, Hide & Unhide, Unhide Columns

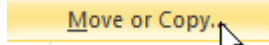
Just go to the far right and get the solid black arrow  and drag down to the bottom. Then copy



click in the first cell after the last row of data and then paste.

Then copy the Details tab from the newly opened spreadsheet to the combined spreadsheet. And repeat the same steps as above for this tab.

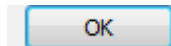
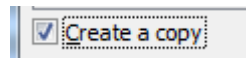
Right click on the Details (2) tab and select




Select the combine spreadsheet



(move to end)



click between the A and the 1 Home tab, format, Hide & Unhide, Unhide Columns

Just go to the far right and get the solid black arrow  and drag down to the bottom. Then copy



click in the first cell after the last row of data and then paste.

Save the combined spreadsheet
Close the newly opened spreadsheet

Delete the Purchase Orders (2) tab
And the Details (2) tab

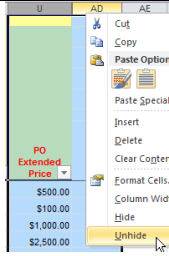
Right click on the Purchase Orders (2) tab and delete
Right click on the Details (2) tab

Save the combined spreadsheet

Start back at Step 1 above and do the same thing down to these instructions for as many years as requested for this report.

Once all the years data has been combined, go to the end of the details tab \, unhide the last columns then then and add the following columns:

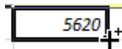
Vendor Num
Address
City
State
Zip



In the first row after the new titles:
To pull the Vendor Num:

```
=IF(ISNA(VLOOKUP(D8,'Purchase Orders'!$C$5:$P$65336,14,FALSE)),"",VLOOKUP(D8,'Purchase Orders'!$C$5:$P$65336,14,FALSE))
```

Double click the small black box in the lower right corner of the box to copy the formula down



To pull the address:

```
=IF(ISNA(VLOOKUP(D8,'Purchase Orders'!$C$5:$R$65336,16,FALSE)),"",VLOOKUP(D8,'Purchase Orders'!$C$5:$R$65336,16,FALSE))
```

Double click the small black box in the lower right corner of the box to copy the formula down

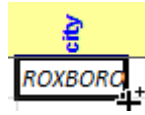


To pull the city:

```
=IF(ISNA(VLOOKUP(D8,'Purchase Orders'!$C$5:$S$65336,17,FALSE)),"",VLOOKUP(D8,'Purchase Orders'!$C$5:$S$65336,17,FALSE))
```

Double click the small black box in the lower right corner of the box to copy the formula down

```
=",VLOOKUP(D8,'Purchase  
Orders'!$C$5:$S$65336,17,FALSE))
```



To pull the state:

```
=IF(ISNA(VLOOKUP(D8,'Purchase  
Orders'!$C$5:$T$65336,18,FALSE))),"  
",VLOOKUP(D8,'Purchase  
Orders'!$C$5:$T$65336,18,FALSE))
```

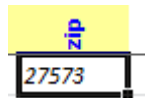
Double click the small black box in the lower right corner of the box to copy the formula down



To pull the zip:

```
=IF(ISNA(VLOOKUP(D8,'Purchase  
Orders'!$C$5:$U$65336,19,FALSE))),"  
",VLOOKUP(D8,'Purchase  
Orders'!$C$5:$U$65336,19,FALSE))
```

Double click the small black box in the lower right corner of the box to copy the formula down

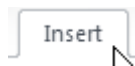


Create a PT for the Details tab:

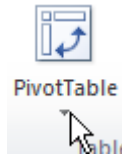
Unhide all the columns on the Details tab

Highlight all the data in the Details tab. Be sure to include the headings of the columns

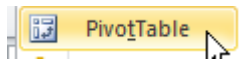
Go to the Insert tab in the excel ribbon



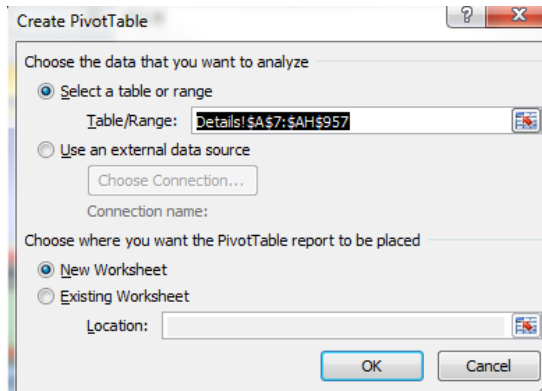
Click on arrow under PivotTable



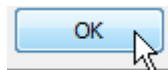
Click on PivotTable



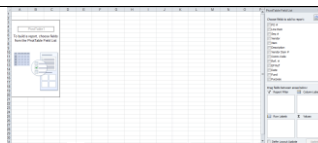
The Table/Range will vary depending on the data



Click OK



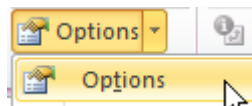
This will open to a new Tab and this is where the PT for the new report will reside. It will look something like this.



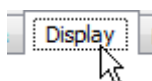
Go to the PivotTable Tools, Options tab



Click on Options/Options



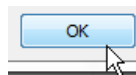
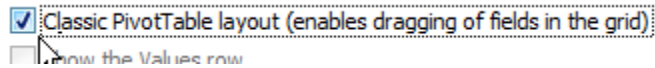
Click on Display Tab



Go to the PivotTable Tools, Design tab

Click to put a check beside: Classic PivotTable layout (this puts the column headings in the PT like we are used to seeing them)

Click OK



Pull the columns on the PT in the following order:

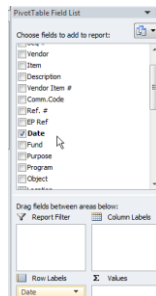
- Date
- PO #
- Item
- PO Qty
- PO (this is amount) verify with customer what this needs to be
- Vendor Num
- Vendor
- Address
- City
- State
- Zip

By dragging them from the top of the PivotTable Field List down into the Row Labels. Once a few are in the Row Labels box, you can just drag the fields onto the PT.

This shows the Date ->

A	B	C	D	E
Date	PO #	Item	PO Qty	PO

F	G	H	I	J	K
Vendor Num	Vendor	Address	City	State	zip



Move all fields to the PT

Remove totals from all columns in the PT. I suggest starting with zip and moving backwards. Seems less confusing to me.

Right click on the column and select



Click on None

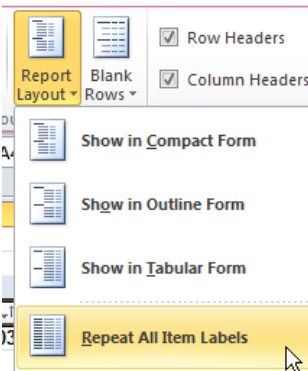
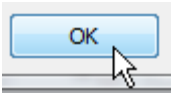
Repeat for all columns on the PT.

Click PivotTable Tools/Design tab

Click Report Layout
Then select 'Repeat All Item Labels'

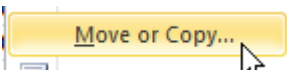
Subtotals

- Automatic
- None
- Custom



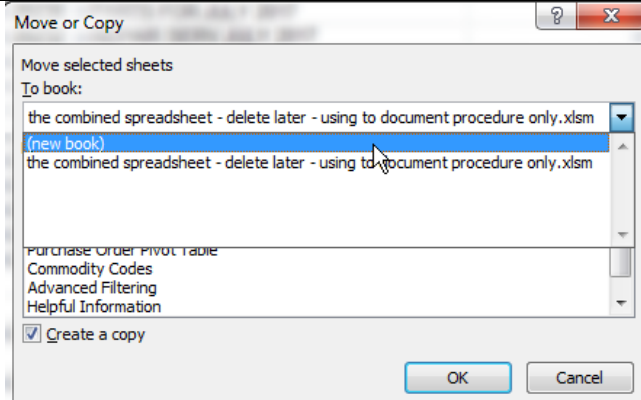
Copy this newly created PT out to another workbook.
Right click on the tab and select 'Move or copy'

Drop down the arrow under To Book and select (new book)



Be sure to check beside 'Create a copy'

Press OK



Save this with a name and then send it to the person requesting this information.

Example:

