

60-Second Trick #2

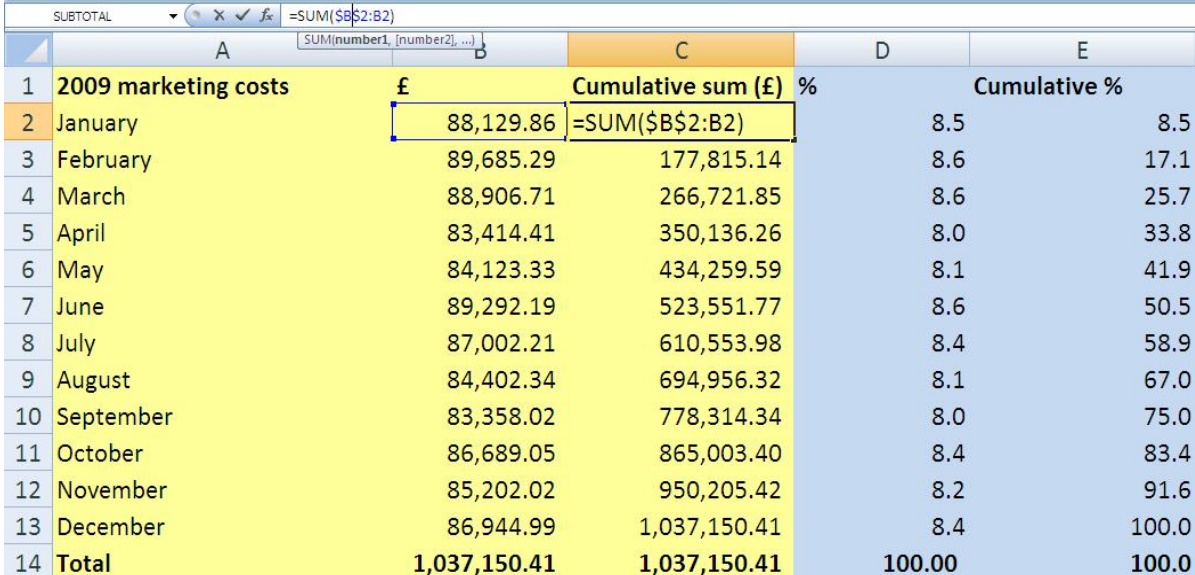
Cumulative Sums

We often have an ordered list of items each with an assigned value such as revenue or cost which we need to analyse and understand. It is sometimes important to know how these numbers are adding up in order that we can be alerted to business limits ((budgets, deadlines, etc.) being approached or reached.

Suppose we have some monthly marketing costs in a spreadsheet. And suppose we want to know how much we have cumulatively spent at any given month of the year, so that we can see, for example, at what point we hit certain budget levels eg £500k. There are a number of unwieldy ways of doing this (eg put =B2 into C2 and then =C2+B3 into C3, etc.) but here's the best.

Type **=SUM(\$B\$3:B3)** into cell C3.

What this is doing is asking Excel to add up all the cells starting from B3 down to the current row (in the first case this is also B3). So in cell C4 you should have =SUM(\$B\$3:B4). Pay special attention to the dollar signs – you will not be able to copy the formula down if these are wrong! Copying the formula down for the remaining 10 lines will give (see yellow):



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E
1	2009 marketing costs	£	Cumulative sum (£) %		Cumulative %
2	January	88,129.86	=SUM(\$B\$2:B2)	8.5	8.5
3	February	89,685.29	177,815.14	8.6	17.1
4	March	88,906.71	266,721.85	8.6	25.7
5	April	83,414.41	350,136.26	8.0	33.8
6	May	84,123.33	434,259.59	8.1	41.9
7	June	89,292.19	523,551.77	8.6	50.5
8	July	87,002.21	610,553.98	8.4	58.9
9	August	84,402.34	694,956.32	8.1	67.0
10	September	83,358.02	778,314.34	8.0	75.0
11	October	86,689.05	865,003.40	8.4	83.4
12	November	85,202.02	950,205.42	8.2	91.6
13	December	86,944.99	1,037,150.41	8.4	100.0
14	Total	1,037,150.41	1,037,150.41	100.00	100.0

This trick also calculates cumulative percentages nicely (on the right, in blue).

Excel with Business

This short lesson is from Unit 11 (of 32) of Excel with Business's online Excel-training course – see www.excelwithbusiness.com/training.aspx for more details.