Case backlog and follow-ups

Independent practice project with fictional data. Currency is CAD.

As-of date for this exercise 2026-11-08

Step	Practice task
1	On Cases, filter out Closed and sort by the earliest follow-up date.
2	Fill Follow-up flag with IF and AND. A case is overdue if it is open and due before the date in C5.
3	Use COUNTIFS to count overdue cases and SUMIFS to total their balances.
4	Clear the filter. Insert a PivotTable with Status in Rows, Count of Case ID and Sum of Balance in Values, and Team in Filters.
5	Filter to Team B, then clear the filter. Change one balance on Cases and refresh to see the total update.

Answer checks	Expected
Total cases	48
Open cases	32
Overdue open cases	16
Total balance for overdue open cases	$127,136.00
PivotTable grand total balance	$407,832.00

Case ID	Status	Team	Received date	Follow-up date	Balance (CAD)	Follow-up flag
CASE-101	Awaiting documents	Team A	2026-09-29	2026-10-26	$2,250.00	Overdue
CASE-113	Awaiting documents	Team B	2026-10-01	2026-10-27	$10,878.00	Overdue
CASE-125	Awaiting documents	Team C	2026-10-03	2026-10-28	$5,306.00	Overdue
CASE-137	Awaiting documents	Team A	2026-10-05	2026-10-29	$13,934.00	Overdue
CASE-110	Awaiting documents	Team A	2026-10-20	2026-11-02	$8,721.00	Overdue
CASE-122	Awaiting documents	Team B	2026-10-22	2026-11-03	$3,149.00	Overdue
CASE-134	Awaiting documents	Team C	2026-10-24	2026-11-04	$11,777.00	Overdue
CASE-146	Awaiting documents	Team A	2026-09-30	2026-11-05	$6,205.00	Overdue
CASE-107	Awaiting documents	Team C	2026-10-13	2026-11-09	$6,564.00	
CASE-119	Awaiting documents	Team A	2026-10-15	2026-11-10	$15,192.00	
CASE-131	Awaiting documents	Team B	2026-10-17	2026-11-11	$9,620.00	
CASE-143	Awaiting documents	Team C	2026-10-19	2026-11-12	$4,048.00	
CASE-104	Awaiting documents	Team B	2026-10-06	2026-11-16	$4,407.00	
CASE-116	Awaiting documents	Team C	2026-10-08	2026-11-17	$13,035.00	
CASE-128	Awaiting documents	Team A	2026-10-10	2026-11-18	$7,463.00	
CASE-140	Awaiting documents	Team B	2026-10-12	2026-11-19	$16,091.00	
CASE-103	Closed	Team C	2026-10-21	2026-11-09	$3,688.00	
CASE-106	Closed	Team A	2026-10-02	2026-11-02	$5,845.00	
CASE-109	Closed	Team B	2026-10-09	2026-10-26	$8,002.00	
CASE-112	Closed	Team C	2026-10-16	2026-11-16	$10,159.00	
CASE-115	Closed	Team A	2026-10-23	2026-11-10	$12,316.00	
CASE-118	Closed	Team B	2026-10-04	2026-11-03	$14,473.00	
CASE-121	Closed	Team C	2026-10-11	2026-10-27	$2,430.00	
CASE-124	Closed	Team A	2026-10-18	2026-11-17	$4,587.00	
CASE-127	Closed	Team B	2026-09-29	2026-11-11	$6,744.00	
CASE-130	Closed	Team C	2026-10-06	2026-11-04	$8,901.00	
CASE-133	Closed	Team A	2026-10-13	2026-10-28	$11,058.00	
CASE-136	Closed	Team B	2026-10-20	2026-11-18	$13,215.00	
CASE-139	Closed	Team C	2026-10-01	2026-11-12	$15,372.00	
CASE-142	Closed	Team A	2026-10-08	2026-11-05	$3,329.00	
CASE-145	Closed	Team B	2026-10-15	2026-10-29	$5,486.00	
CASE-148	Closed	Team C	2026-10-22	2026-11-19	$7,643.00	
CASE-105	In review	Team C	2026-10-17	2026-10-26	$5,126.00	Overdue
CASE-117	In review	Team A	2026-10-19	2026-10-27	$13,754.00	Overdue
CASE-129	In review	Team B	2026-10-21	2026-10-28	$8,182.00	Overdue
CASE-141	In review	Team C	2026-10-23	2026-10-29	$2,610.00	Overdue
CASE-102	In review	Team B	2026-10-10	2026-11-02	$2,969.00	Overdue
CASE-114	In review	Team C	2026-10-12	2026-11-03	$11,597.00	Overdue
CASE-126	In review	Team A	2026-10-14	2026-11-04	$6,025.00	Overdue
CASE-138	In review	Team B	2026-10-16	2026-11-05	$14,653.00	Overdue
CASE-111	In review	Team B	2026-10-05	2026-11-09	$9,440.00	
CASE-123	In review	Team C	2026-10-07	2026-11-10	$3,868.00	
CASE-135	In review	Team A	2026-10-09	2026-11-11	$12,496.00	
CASE-147	In review	Team B	2026-10-11	2026-11-12	$6,924.00	
CASE-108	In review	Team A	2026-10-24	2026-11-16	$7,283.00	
CASE-120	In review	Team B	2026-09-30	2026-11-17	$15,911.00	
CASE-132	In review	Team C	2026-10-02	2026-11-18	$10,339.00	
CASE-144	In review	Team A	2026-10-04	2026-11-19	$4,767.00	

CountIFs	16
SumIFs	127136
Previous Value	$10,878.00

Team	(All)

Row Labels	Count of Case ID	Sum of Balance (CAD)
Awaiting documents	16	138640
Closed	16	133248
In review	16	135944
Grand Total	**48**	**407832**

Change Value	44245

Status	Case count	Balance (CAD)
Awaiting documents	16	$138,640.00
In review	16	$135,944.00
Closed	16	$133,248.00

Compare your PivotTable with this formula summary.