



## Pivot Table Prowess



Written and Presented by  
David H. Ringstrom, CPA  
Accounting Advisors, Inc.  
[www.accountingadvisors.com](http://www.accountingadvisors.com)

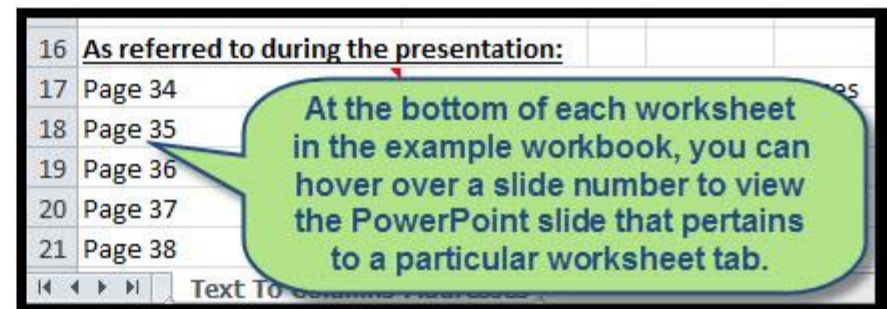
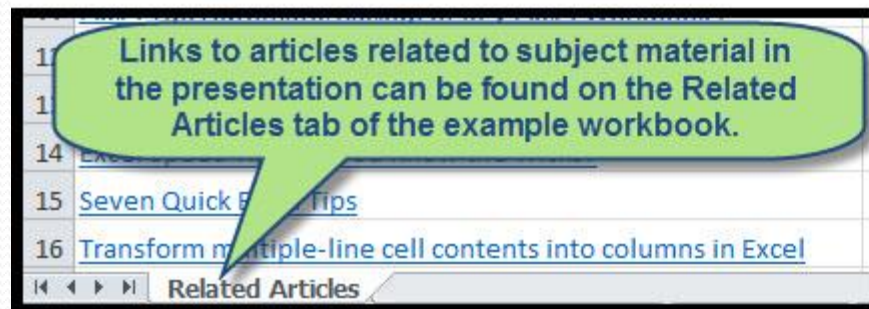
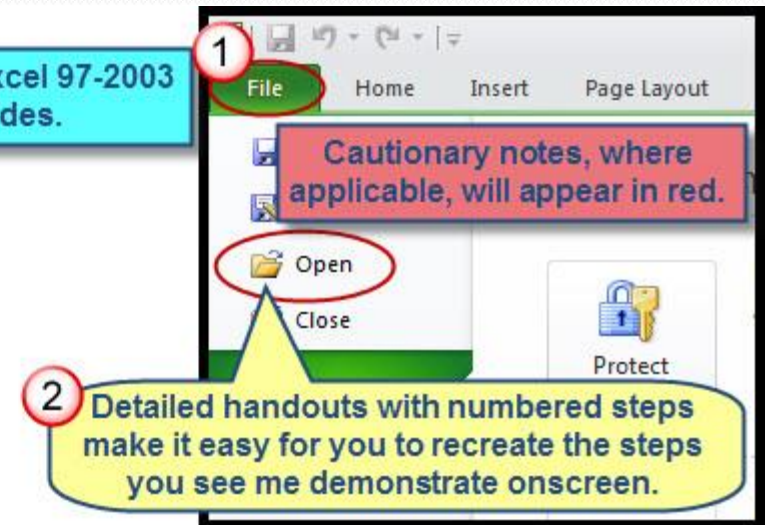
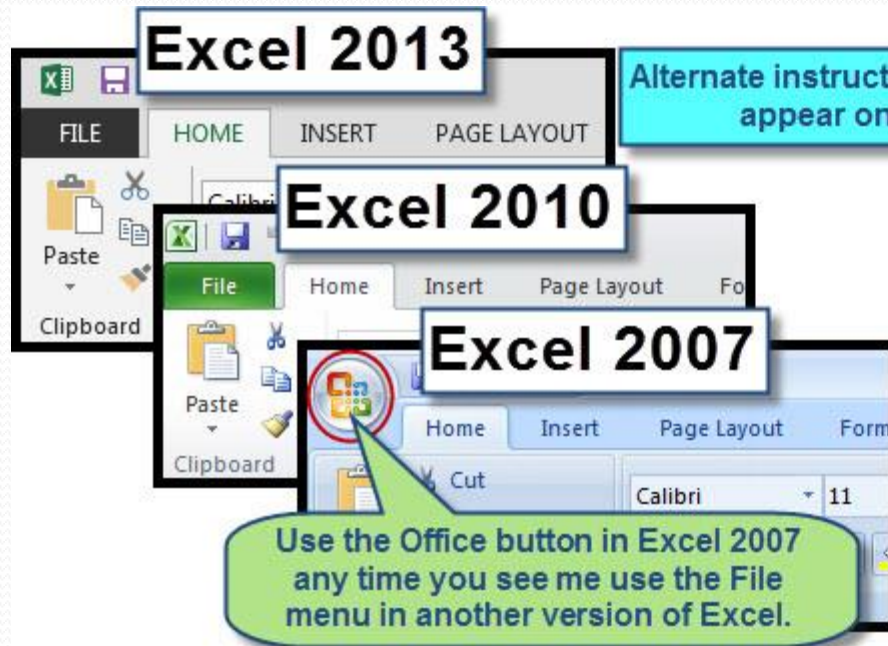
### **About the speaker:**

David is owner of Accounting Advisors, Inc., an Atlanta-based spreadsheet consulting firm that he started in 1991. He shares his 20+ years of hard-fought Excel knowledge by way of consulting engagements, freelance articles, and public speaking. David offers spreadsheet consulting and training services nationwide.

# Please Ask Questions Today

- These webcasts are designed to be interactive. Some of the best learning comes from questions from the audience, and I'm here to help you.
- I often incorporate the answers to questions that get raised into future sessions of this webcast, so your questions might improve this presentation for others in the future.
- Please feel free to email questions to **david@acctadv.com** after the presentation as well.

# Excel Versions







# Ideal Data for Pivot Tables

Pivot Table 101 - Fruit.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer

General Conditional Formatting Insert Σ A B C D E F G H I J K

- Each column must have a title.
- Titles need to be in a single cell.
- Reword titles if necessary so that you can remember what data is in that field.
- Each title must be unique.

Make sure the data file is anything except XLS. Certain features will work differently or be disabled if your workbook is in the obsolete Excel 97-2003 workbook format.

Region	City	Vendor	Product	Cases Sold	Total Sales
North GA	Atlanta	Fruit R Us	Oranges	6168	61680
North GA	Atlanta	Fruit R Us	Apples	6079	60790
North GA	Atlanta	Fruit R Us	Kiwi	6058	
North GA	Atlanta	Fruit R Us	Bananas		
North GA	Atlanta	Fruit R Us	Mixed Berries		
North GA	Atlanta	Bob's Fruit	Oranges		
North GA	Atlanta	Bob's Fruit	Apples	1565	21910
North GA	Atlanta	Bob's Fruit	Kiwi	9967	99670
North GA	Atlanta	Bob's Fruit	Bananas	98	
			Mixed Berries	89	
			Oranges	4933	49330
			Apples	7704	77040
			Kiwi	5519	55190

Blank cells are permissible in columns that contain text, but not in columns that are comprised of numbers.

Be sure to remove any total rows at the bottom of the list.

No blank rows or columns, all cells with data must be contiguous.

Ready | 100%



# Initiating a Pivot Table

Microsoft Excel - Pivot Table 101 - Fruit.xlsx

File Home **Insert** (2) Page Layout Formulas Data Review View Developer

PivotTable (3) Table Picture Clipart SmartArt Charts (Line, Area, Scatter, Pie, Bar, Other Charts) Sparklines (Line, Column, Win/Loss) Filter Slicer Hyperlink Links Text Box Header & Footer Text Symbols

1 Click anywhere within your data.

Region

	A	B	C
1	Region	City	Vendor
2	North GA	Atlanta	Fruit R Us
3	North GA	Atlanta	Fruit R Us
4	North GA	Atlanta	Fruit R Us
5	North GA	Atlanta	Fruit R Us
6	North GA	Atlanta	Fruit R Us
7	North GA	Atlanta	Bob's Fruit
8	North GA	Atlanta	Bob's Fruit
9	North GA	Atlanta	Bob's Fruit
10	North GA	Atlanta	Bob's Fruit
11	North GA	Atlanta	Bob's Fruit
12	North GA	Atlanta	Fruitju
13	North GA	Atlanta	Fruitju
14	North GA	Atlanta	Fruitju

Create PivotTable

Choose the data that you want to analyze

☒ Select a table or range

Table/Range: 'Fruit Data'!\$A\$1:\$F\$51

☐ Use an external data source

Choose Connection...

Connection name:

Choose where you want the PivotTable report to be placed

☒ New Worksheet

☐ Existing Worksheet

Location:

4 OK Cancel

Ready

100%





# Pivot Table Interfaces

**When you click on your pivot table, these two menus appear on the ribbon.**

**PivotTable Tools**

**Options** **Design**

**This tab is labeled Analyze in Excel 2013.**

**This is the Pivot Table Field List from which you select and position the fields you want to see on the Pivot Table.**

**PivotTable1**

To build a report, choose fields from the PivotTable Field List

**This is the blank pivot table area before any fields have been added.**

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☐ Vendor
- ☐ Product
- ☐ Cases Sold

Drag fields between areas below:

Report Filter    Column Labels

Row Labels    Values

☐ Defer Layout Update    Update



# Adding Fields to a Pivot Table

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☐ Vendor
- ☒ **Product**
- ☐ Cases Sold
- ☒ **Total Sales**

Drag fields between areas below:

Report Filter: ☐ Column Labels: ☐

Row Labels: **Product** Values: **Sum of Total ...**

☐ Defer Layout Update **Update**

**3** The Pivot Table has been updated with the Products and Total Sales in their respective fields.

Row Labels	Sum of Total Sales
Apples	614847
Bananas	756649
Kiwi	643277
Mixed Berries	518888
Oranges	715977
<b>Grand Total</b>	<b>3249638</b>



# Adding Another Row Field

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☒ **Vendor**
- ☒ **Product**
- ☐ Cases Sold
- ☐ Total Sales

Drag fields between areas below:

Report Filter: ☐ Column Labels: ☐

Row Labels: Product, Vendor

Values: Sum of Total ...

☐ Defer Layout Update

**1** Click on Vendor to add another Row Label to the Pivot Table.

**2** The Pivot Table has been updated. The Vendors and their respective Total Sales fall below each of the Products.

Row Labels	Sum of Total Sales
<b>Apples</b>	<b>614847</b>
Bob's Fruit	21910
Fruit Direct	82030
Fruit R Us	85106
Fruitju	107856
Middle Georgia Fruit	15764
Mountain Fruit	83538
Navel Oranges & More	17777
Orange U Glad	
Oranges 'n Onions	
Whistlestop Fruit Stand	
<b>Bananas</b>	<b>756649</b>
Bob's Fruit	98420
Fruit Direct	107406
Fruit R Us	75548
Fruitju	126630
Middle Georgia Fruit	14730
Mountain Fruit	60900
Navel Oranges & More	23415
Orange U Glad	81521





# Adding Columns to Pivot Tables

	A	B	C	D	E	F	G
1							
2							
3	<b>Sum of Total Sales</b>	<b>Column Labels</b>					
4	<b>Row Labels</b>	<b>Apples</b>	<b>Bananas</b>	<b>Kiwi</b>	<b>Mixed Berries</b>	<b>Oranges</b>	<b>Grand Total</b>
5	Bob's Fruit	21910	98420	99670	89930	93816	403746
6	Fruit Direct	82030	107406	58800	51012	9604	308852
7	Fruit R Us	85106	75548	66638	29940	61680	318912
8	Fruitju	107856	126630	71747	11557	54263	372053
9	Middle Georgia Fruit	15764	14730	45960	48466	71097	196017
10	Mountain Fruit	83538	60900	112490	36768	89810	383506
11	Navel Oranges & More	17772	23415	64669	68016	61501	235373
12	Orange U Glad	31260	81521	43121	93405	72061	321368
13	Oranges 'n Onions	61464	80145	11682	8350	52400	214041
14	Whistlestop Fruit Stand	108147	87934	68500	81444	149745	495770
15	<b>Grand Total</b>	<b>614847</b>	<b>756649</b>	<b>643277</b>	<b>518888</b>	<b>715977</b>	<b>3249638</b>

**2** The Pivot Table has been updated.

**1** Drag Product from the Row Labels area to the Column Labels area.

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☒ Vendor
- ☒ Product
- ☐ Cases Sold
- ☒ Total Sales

Drag fields between areas below:

Report Filter: ☐

Column Labels: Product

Row Labels: Product, Vendor

Values: Sum of Total ...

☐ Defer Layout Update

Update



# XLS Files

Pivot Table 101 - Fruit.xls - Microsoft Excel

PivotTable Tools: Options, Design

File Home Insert Page Layout Formulas Data Review View Developer

Clipboard Font Alignment Number Styles Cells Editing

Conditional Formatting Format as Table Cell Styles

Insert Delete Format Sort & Filter Find & Select

A3 Sum of Total Sales

Product	Total
Apples	614847
Bananas	756649
Kiwi	643277
Mixed Berries	518888
Oranges	715977
Grand Total	3249638

When you create a Pivot Table using an .xls file, they look out dated.

PivotTable Field List

Choose fields to add to report:

- ☐ City
- ☐ Vendor
- ☒ Product
- ☐ Cases Sold
- ☒ Total Sales

Drag fields between areas below:

Report Filter: [ ] Column Labels: [ ]

Row Labels: Product Values: Sum of Total ...

☐ Defer Layout Update Update

Pivot Table Fruit Data

Ready 100%





# Convert Excel 2003/XLS Workbooks

**1** File

**2** The Convert command only appears within XLS workbooks.

**3** OK

**4** Yes

**Compatibility Mode**

Some new features are disabled to prevent problems when working with previous versions of Office. Converting this file will enable these features, but may result in layout changes.

**Microsoft Excel**

This action converts the workbook to the current file format, which allows you to use all of the new features of Excel, and it reduces the file size. The original workbook will be deleted and cannot be restored after this conversion.

☐ Do not ask me again about converting workbooks.

Tell Me More...

**Microsoft Excel**

The workbook conversion to the current file format completed successfully. To use the new and enhanced features of the current file format, you must close and reopen the workbook. Do you want to close and reopen the workbook now?

Yes No





# Number Formatting

**Pivot Table 101 - Fruit.xlsx - Microsoft Excel**

**PivotTable Tools** | Options | Design

**Home** | Font | Alignment | Number | Conditional Formatting | Insert | Σ

**1** Right-click on the Field Name.

**2** Number Format...

**3** Select your number formatting from this dialog box, and press OK.

You can also format the numbers using the Number section of the Home tab although steps 1-3 provide the best results.

Row Labels	Sum of Total Sales
Apples	614847
Bob's Fruit	2191
Fruit Direct	8203
Fruit R Us	85106
Fruitju	107856
Middle Georgia Fruit	15764
Mountain Fruit	83538
Navel Oranges & More	17772
Orange U Glad	31260
Oranges 'n Onions	61464
Whistleton Fruit Stand	108147

**Format Cells**

Category:

- General
- Number
- Currency
- Accounting
- Date
- Time
- Percentage
- Fraction
- Scientific
- Text
- Special
- Custom

Sample: Sum of Total Sales

General format cells have no specific number format.

OK Cancel



# Removing Fields from a Pivot Table

Alternatively, unclick the checkbox to remove the field from the table.

The products have been removed from the pivot table.

You can also drag the field out of the PivotTable Field List.

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☒ Vendor
- ☒ Product
- ☐ Cases Sold
- ☒ Total Sales

Drag fields between areas below:

Report Filter: Vendor

Column Labels: 1 Product

Values: 2 Sum of Total Sales

Remove Field

Row Labels	Apples	Bananas	Kiwi	Mixed Berries	Oranges	Grand Total
Bob's Fruit	21910	9				46
Fruit Direct	82030	10				92
Fruit R Us	85106	75548	66638	29940	61680	318912
Fruitju	107856	126630	71747	11557	54263	372053
Middle Georgia Fruit	15764	14730	45960	48466	71097	196017
Mountain Fruit	83538	60900	112490	36768	89810	383506
		23415	64669	68016	61501	235373
		81521	43121	93405	72061	321368
Bob's Fruit	403746	80145	11682	8350	52400	214041
Fruit Direct	308852	87934	68500	81444	149745	495770
		56649	643277	518888	715977	3249638
Mountain Fruit	383506					
Navel Oranges & More	235373					
Orange U Glad	321368					
Oranges 'n Onions	214041					
Whistlestop Fruit Stand	495770					
Grand Total	3249638					





# Text Within Data

**1** Region **2** City **3** Vendor **4** Product **5** Cases Sold **6** Total Sales

**7** Total Sales is automatically added to the Row Labels field because of the text in cell B2 on the Fruit Data tab.

This cell contains text.

**8** North GA **9** Atlanta **10** Fruit R Us **11** Oranges **12** 6168 **13** 61680

**14** North GA **15** Atlanta **16** Fruit R Us **17** Apples **18** 6079 **19** 5106

**20** North GA **21** Atlanta **22** Fruit R Us **23** Kiwi **24** 6058 **25** 66638

**26** North GA **27** Atlanta **28** Fruit R Us **29** Ba **30** 21910

**31** North GA **32** Atlanta **33** Fruit R Us **34** Mi **35** 89930

**36** North GA **37** Atlanta **38** Bob's Frui **39** Oranges **40** 7818 **41** 93816

**42** North GA **43** Atlanta **44** Bob's Frui **45** Apples **46** 1565 **47** 21910

**48** North GA **49** Atlanta **50** Fruitju **51** Oranges **52** 4933 **53** 54263

**54** North GA **55** Atlanta **56** Fruitju **57** Apples **58** 7704 **59** 107856

**60** North GA **61** Atlanta **62** Fruitju **63** Kiwi **64** 5519 **65** 71747

**66** North GA **67** Atlanta **68** Fruitju **69** Oranges **70** 8118 **71** 106688

**72** North GA **73** Atlanta **74** Fruitju **75** Apples **76** 8118 **77** 106688

**78** North GA **79** Atlanta **80** Fruitju **81** Kiwi **82** 8118 **83** 106688

**84** North GA **85** Atlanta **86** Fruitju **87** Oranges **88** 8118 **89** 106688

**90** North GA **91** Atlanta **92** Fruitju **93** Apples **94** 8118 **95** 106688

**96** North GA **97** Atlanta **98** Fruitju **99** Kiwi **100** 8118 **101** 106688

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**732** North GA **733** Atlanta **734** Fruitju **735** Oranges **736** 8118 **737** 106688

**738** North GA **739** Atlanta **740** Fruitju **741** Apples **742** 8118 **743** 106688

**744** North GA **745** Atlanta **746** Fruitju **747** Kiwi **748** 8118 **749** 106688

**750** North GA **751** Atlanta **752** Fruitju **753** Oranges **754** 8118 **755** 106688

**756** North GA **757** Atlanta **758** Fruitju **759** Apples **760** 8118 **761** 106688

**762** North GA **763** Atlanta **764** Fruitju **765** Kiwi **766** 8118 **767** 106688

**768** North GA **769** Atlanta **770** Fruitju **771** Oranges **772** 8118 **773** 106688

**774** North GA **775** Atlanta **776** Fruitju **777** Apples **778** 8118 **779** 106688

**780** North GA **781** Atlanta **782** Fruitju **783** Kiwi **784** 8118 **785** 106688

**786** North GA **787** Atlanta **788** Fruitju **789** Oranges **790** 8118 **791** 106688

**792** North GA **793** Atlanta **794** Fruitju **795** Apples **796** 8118 **797** 106688

**798** North GA **799** Atlanta **800** Fruitju **801** Kiwi **802** 8118 **803** 106688

**804** North GA **805** Atlanta **806** Fruitju **807** Oranges **808** 8118 **809** 106688

**810** North GA **811** Atlanta **812** Fruitju **813** Apples **814** 8118 **815** 106688

**816** North GA **817** Atlanta **818** Fruitju **819** Kiwi **820** 8118 **821** 106688

**822** North GA **823** Atlanta **824** Fruitju **825** Oranges **826** 8118 **827** 106688

**828** North GA **829** Atlanta **830** Fruitju **831** Apples **832** 8118 **833** 106688

**834** North GA **835** Atlanta **836** Fruitju **837** Kiwi **838** 8118 **839** 106688

**840** North GA **841** Atlanta **842** Fruitju **843** Oranges **844** 8118 **845** 106688

**846** North GA **847** Atlanta **848** Fruitju **849** Apples **850** 8118 **851** 106688

**852** North GA **853** Atlanta **854** Fruitju **855** Kiwi **856** 8118 **857** 106688

**858** North GA **859** Atlanta **860** Fruitju **861** Oranges **862** 8118 **863** 106688

**864** North GA **865** Atlanta **866** Fruitju **867** Apples **868** 8118 **869** 106688

**870** North GA **871** Atlanta **872** Fruitju **873** Kiwi **874** 8118 **875** 106688

**876** North GA **877** Atlanta **878** Fruitju **879** Oranges **880** 8118 **881** 106688

**882** North GA **883** Atlanta **884** Fruitju **885** Apples **886** 8118 **887** 106688

**888** North GA **889** Atlanta **890** Fruitju **891** Kiwi **892** 8118 **893** 106688

**894** North GA **895** Atlanta **896** Fruitju **897** Oranges **898** 8118 **899** 106688

**900** North GA **901** Atlanta **902** Fruitju **903** Apples **904** 8118 **905** 106688

**906** North GA **907** Atlanta **908** Fruitju **909** Kiwi **910** 8118 **911** 106688

**912** North GA **913** Atlanta **914** Fruitju **915** Oranges **916** 8118 **917** 106688

**918** North GA **919** Atlanta **920** Fruitju **921** Apples **922** 8118 **923** 106688

**924** North GA **925** Atlanta **926** Fruitju **927** Kiwi **928** 8118 **929** 106688

**930** North GA **931** Atlanta **932** Fruitju **933** Oranges **934** 8118 **935** 106688

**936** North GA **937** Atlanta **938** Fruitju **939** Apples **940** 8118 **941** 106688

**942** North GA **943** Atlanta **944** Fruitju **945** Kiwi **946** 8118 **94**





# Subtotal by Region

**1** Drag Region above Vendor.

**2** Excel automatically places subtotals at the top of each group.

**A** If you check the Region field...

**B** ...it will appear below Vendor.

**PivotTable Field List**

Choose fields to add to report:

- ☒ Region
- ☐ City
- ☒ Vendor
- ☐ Product
- ☒ Cases Sold
- ☐ Total Sales

Drag fields between areas below:

Report Filter: [Empty]

Column Labels: [Empty]

Row Labels: Vendor, Region

Values: Sum of Cases...

Defer Layout Update: ☐ Update

Row Labels	Sum of Cases Sold
Mid GA	56088
Middle Georgia Fruit	15538
Whistlestop Fruit Stand	40550
North GA	173289
Bob's Fruit	27487
	29015
	26111
	38210
	20180
	18030
	267587



# Show Subtotals at Bottom of Group

Pivot Table 101 - Fruit.xlsx - Microsoft Excel

**PivotTable Tools** (Design tab selected)

**Subtotals** (2) dropdown menu:

- Do Not Show Subtotals
- Show all Subtotals at **Bottom** of Group (3)
- Show all Subtotals at Top of Group
- Include Filtered Items in Totals

**Subtotals now appear at the bottom of each group.** (4)

Row Labels	Sum of Cases Sold
<b>Mid GA</b>	
Middle Georgia Fruit	15538
Whistlestop Fruit Stand	40550
<b>Mid GA Total</b>	<b>56088</b>
<b>North GA</b>	
Bob's Fruit	38185
Fruit Direct	25322
Fruit R Us	27169
Fruitju	27487
Mountain Fruit	29015
Orange U Glad	26111
<b>North GA Total</b>	<b>173289</b>
<b>South GA</b>	
Navel Oranges & More	20180
Oranges 'n Onions	18030
<b>South GA Total</b>	<b>38210</b>
<b>Grand Total</b>	<b>267587</b>





# Expanding/Collapsing

**PivotTable Tools** Options Design

File Home Insert Page Layout Formulas Data Review View Developer

PivotTable Name: Active Field: Vendor

Options Field Settings Group Field Sort & Filter Data Actions

Expand Entire Field Collapse Entire Field

Click here to expand the entire field.

1 Select a field within the table.

2

3

4 The fields have been collapsed.

5 Click the plus sign to drill back into the pivot table.

6 This field has been expanded.

Row Labels	Sum of Cases Sold
Mid GA	56088
Middle Georgia Fruit	1553
Whistlestop Fruit Stand	4055
North GA	17328
Bob's Fruit	3818
Fruit Direct	2532
Fruit Bunch	2716
Florida Fruit	2611
Orange U Glad	2611
South GA	3821
Grand Total	267587

Row Labels	Sum of Cases Sold
Mid GA	56088
North GA	173289
South GA	38210
Grand Total	267587

Row Labels	Sum of Cases Sold
Mid GA	56088
North GA	173289
South GA	38210
Navel Oranges & More	20180
Oranges 'n Onions	18030
Grand Total	267587





# Sorting Fields

**1** Right-click on a number.

**2** Sort

**3** Sort Largest to Smallest

**Note:** Sorting occurs based on the field level, not the entire Pivot Table.

**A** Right-click on Vendor.

**B** Sort

**C** Sort A to Z

**When you click on a text item, step C says Sort A to Z instead of Sort Largest to Smallest.**

**4** The data is now sorted Largest to Smallest.

Row Labels	Sum of Cases Sold
North GA	173289
Bob's Fruit	38185
Fruit Direct	25322
Fruit R Us	27169
Fruitju	27487
Mountain Fruit	29015
Orange U Glad	26111
Mid GA	56088
Middle Georgia Fruit	15538
Whistlestop Fruit Stand	40550
South GA	38210
Navel Oranges & More	20180
Oranges 'n Onions	18030
<b>Grand Total</b>	<b>267587</b>



# Renaming Fields

**1** Click on the cell.

**2** Type "Total Sales " with a space at the end, and press Enter.

**3** The Name has been updated to Total Sales.

You would have received this error message if you typed "Total Sales" without a space at the end.

You can't use a name in the field list when renaming fields. That is why we added a space after "Total Sales" in step 2.

Row Labels	Sum of Total Sales
Bob's Fruit	403746
Fruit Direct	308852
Fruit R Us	318912
Fruitju	372053
Middle Georgia Fruit	196017
Mountain Fruit	383506
Navel Oranges & More	235373
Orange U Glad	321368
Oran	
Whis	
Grand Total	3247038

Row Labels	Total Sales
Bob's Fruit	403746
Fruit Direct	308852
Fruit R Us	318912
Fruitju	372053





# Filter Columns

**1** You can hide selected data from the table. Click the arrow for that field.

**2** Deselect any unwanted items.

**3** OK

**4** Kiwi and Mixed Berries no longer appear on the report.

The funnel signifies one or more fields have been filtered.

**PivotTable Field List**

Choose fields to add to report:

- ☐ Region
- ☐ City
- ☒ Vendor
- ☒ Product

**Column Labels**

Total Sales	Bananas	Kiwi	Mixed Berries	Oranges	Grand Total
98420	99670		89930	93816	403746
7406	58800		51012	9604	208852
6548	66638				
5630	71747				
14730	45960		48466	71097	196017
60900	112490				
23415	64669				
81521	43121				
80145	11682				
87934	68500				
<b>756649</b>	<b>643271</b>				

**Row Labels**

Apples	Bananas	Oranges	Grand Total
Bob's Fruit	21910	98420	214146
Fruit Direct	82030	107406	199040
Fruit R Us	85106	75548	222334
Fruitju	107856	126630	288749
Middle Georgia Fruit	1576	14730	101591
Mountain Fruit	83	60900	234248
Navel Oranges & More		23415	102688
		61501	184842
			194009
			345826
<b>Grand Total</b>	<b>614847</b>	<b>715977</b>	<b>2087473</b>





# Drill Down

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	<b>Total Sales</b>	<b>Column Labels</b> ▼									
4	<b>Row Labels</b> ▼	<b>Apples</b>	<b>Bananas</b>	<b>Kiwi</b>	<b>Mixed Berries</b>	<b>Oranges</b>	<b>Grand Total</b>				
5	Bob's Fruit	21910	98420	99670	89930	93816	403746				
6	Fruit Direct	82030	107406	58800	51012	9604	308852				
7	Fruit R Us	85106	75548	66638	29940	61680	318912				
8	Fruitju	107856	126630	71747	11557	5426	372053				
9	Middle Georgia Fruit	15764	1473				17				
10	Mountain Fruit	83538	60900				06				
11	Navel Oranges & More	17772	23415				73				
12	Orange U Glad	31260	81521	43121	93405	72061	321368				
13	Oranges 'n Onions	61464	80145	11682	8350	52400	214041				
14	Whistlestop Fruit Stand	108147	87934	68500	81444	149745	495770				
15	<b>Grand Total</b>	<b>614847</b>	<b>756649</b>	<b>643277</b>	<b>518888</b>	<b>715977</b>	<b>3249638</b>				
16											
17											
18											
19											
20											
21											
22											
23											

1 You can double-click on any number within the Pivot Table.

	A	B	C	D	E	F
1	<b>Region</b> ▼	<b>City</b> ▼	<b>Vendor</b> ▼	<b>Product</b> ▼	<b>Cases Sold</b> ▼	<b>Total Sales</b> ▼
2	North GA	Clarkesville	Fruit Direct	Apples	8203	82030
3	North GA	Clarkesville	Fruit Direct	Bananas	8262	107406
4	North GA	Clarkesville	Fruit Direct	Kiwi	3920	58800
5					4251	51012
6					686	9604

2 You can now see a summary of the underlying numbers on a new worksheet.



# Refresh Your Pivot Table

**Pivot Tables are a snapshot of your data in time. Changes to the underlying data will not be reflected in a Pivot Table until you refresh it.**

**1** Click the **Options** tab in the **PivotTable Tools** ribbon.

**2** Click the **Refresh** button in the **Refresh** group.

**3** Click **Refresh All** in the dropdown menu.

**4** The Pivot Table has been updated.

If you change your source data after you have created the Pivot Table, your changes won't be reflected in the Pivot Table until you refresh it. Follow steps 1-3 to manually refresh your Pivot Table.

Row Labels	Sum of Total Sales
Bob's Fruit	403746
Fruit Direct	308852
Fruit R Us	318912
Fruitju	372053
Middle Georgia Fruit	196017

A	B	C	D	E	F
North GA	Atlanta	Bob's Fruit	Oranges	7818	0
North GA	Atlanta	Bob's Fruit	Apples	1565	0
North GA	Atlanta	Bob's Fruit	Kiwi	9967	0
North GA	Atlanta	Bob's Fruit	Bananas	9842	0
North GA	Atlanta	Bob's Fruit	Mixed Ber	8993	0





# Report Filter Feature

**1** Drag City into the Report Filter section.

**2** Click here to filter the Pivot Table by City.

**3** Select the City that you want to filter by.

**4** OK

**5** The Pivot Table is now filtered by the city of Atlanta.

Excel 2007 and later allows you to select multiple items.

**PivotTable Field List**

to add to report:

- ☐ Region
- ☒ **City**
- ☒ **Vendor**
- ☐ Product
- ☐ Cases Sold
- ☒ **Total Sales**

Drag fields between areas below:

**Report Filter**

City

**Column Labels**

**Row Labels**

Vendor

**Values**

Sum of Total ...

☐ Defer Layout Update

Update

City	Atlanta
Bob's Fruit	403746
Fruit R Us	318912
Fruitju	372053
Orange U Glad	321368
<b>Grand Total</b>	<b>1416079</b>



# Generate Multiple Pivot Tables

Pivot Table 101 - Fruit.xlsx - Microsoft Excel

**1** Options

**2** PivotTable Options

**3** Show Report Filter Pages...

**4** OK

**5** Excel created a separate Pivot Table on individual worksheets by city.

Field List: +/- Buttons, Field Headers, Show

Calculations: PivotChart, OLAP Tools, What-If Analysis

Row Labels: Sum of

City	(All)
Bob's Fruit	403746
Fruit Direct	308852
Fruit R Us	
Fruitju	
Middle Georgia Fruit	
Mountain Fruit	
Navel Oranges & More	
Orange U Glad	
Oranges 'n Onions	
Whistlestop Fruit Stand	
<b>Grand Total</b>	

City	Atlanta
Row Labels	Sum of Total Sales
Bob's Fruit	403746
Fruit R Us	318912
Fruitju	372053
Orange U Glad	321368
<b>Grand Total</b>	<b>1416079</b>

Ready | Atlanta | Blue Ridge | Brunswick | Clarkesville | Macon | Valdosta | Pivot Table | Fruit Data





# GetPivotData function

**1** PivotTable Tools - Options tab

**2** Type = B4/C4. Notice the formula in the Formula Bar.

**3** PivotTable Tools - Options tab - Calculations group

**4** Generate GetPivotData checkbox

**5** Unclick this checkbox to prevent Excel from using the GetPivotData function when you create formulas that refer to cells within a Pivot Table.

**6** This is what the formula looks like once the GetPivotData function is turned off.

**Formula Bar:** =GETPIVOTDATA("Sum of Total Sales",\$A\$3,"Vendor","Bob's Fruit")/GETPIVOTDATA("Sum of Cases Sold",\$A\$3,"Vendor","Bob's Fruit")

**Formula Bar (after turning off):** =B4/C4

**PivotTable Field List:**

- Choose fields to add to report:
  - ☒ Vendor
  - ☐ Product
  - ☒ Cases Sold
  - ☒ Total Sales
- Drag fields between areas below:
  - Report Filter: Vendor
  - Column Labels: Sum of To...
- ☐ Defer Layout Update
- Update

Row Labels	Sum of Total Sales	Sum of Cases Sold	
Bob's Fruit	403746	38186	10.57342
Fruit Direct	308852	25322	
Fruit R Us	318912	27169	
Fruitju	272052	274	
Middle Georgia Fruit			
Mountain Fruit			
Navel Oranges & More	235373	20180	
Orange U Glad	321368	26111	
Oranges 'n Onions	214041	18030	
Whistleton Fruit Stand	495770	40550	



# Pivot Table Calculations

The screenshot shows an Excel PivotTable with the following data:

Row Labels	Sum of Total Sales	Sum of Total Sales2
Bob's Fruit	403746	12.42%
Fruit Direct	308852	9.50%
Fruit R Us	318912	9.81%
Fruitju	372053	11.45%
Middle Georgia Fruit	196017	6.03%
Mountain Fruit	383506	11.80%
Navel Oranges &	235373	7.24%
Orange U Glad	321368	9.89%
Oranges 'n Onion	214041	6.59%
Whistlestop Fruit	495770	15.26%
<b>Grand Total</b>	<b>3249638</b>	<b>100.00%</b>

Numbered callouts indicate the steps to create the second calculation:

- 1** Drag Total Sales into the Values section a second time.
- 2** Right-click.
- 3** Value Field Settings...
- 4** % of Column Total
- 5** (Points to the Grand Total row in the PivotTable)

The PivotTable Field List on the right shows 'Total Sales' added to the Values area. The 'Show Values As' dropdown is set to '% of Column Total'.

**In Excel 2007 and earlier, click here to get to the Show Values As tab.**





# Calculated Fields

**Pivot Table 101 - Fruit.xlsx - Microsoft Excel**

**PivotTable Tools**

**Options** (1) **Design** (2)

**Fields, Items & Sets** (3)

**Calculated Field...**

**Calculated Item...**

**Solve Order...**

**List Formulas**

**Field List**

**+/- Buttons**

**Field Headers**

**Show**

**You can also use worksheet functions, such as IF in a calculated field. This is helpful when you need to eliminate #DIV/0! Errors.**

**Insert Calculated Field**

**Name:** Per Case Price

**Formula:** =Total Sales/Cases Sold

**Fields:**

ReqID

Region

CityID

City

VendorID

Vendor

**OK** (6) **Close**

**Row Labels**

**Sum of Total Sales**

**Sum of Per Case Price**

**The Per Case Price field has been added.** (7)

Row Labels	Sum of Total Sales	Sum of Per Case Price
Bob's Fruit	403746	10.57341888
Fruit Direct	308852	12.19698286
Fruit R Us	318912	11.73808385
Fruitju	372053	13.53559865
Middle Georgia Fruit	196017	12.61533016
Mountain Fruit	383506	13.21750819
Navel Oranges & More	235373	11.66367691
Orange U	68	12.30776301
Oranges 'n		11.87138103
Whistlestop	70	12.22614057
<b>Grand Total</b>	<b>3249638</b>	<b>12.14422973</b>

# Questions? Spreadsheet Consulting Help?

I'm happy to hear from you (*e-mail is best*):

David Ringstrom  
Accounting Advisors, Inc.  
614 Park Avenue SE  
Atlanta, Georgia 30312  
404-784-0275  
david@acctadv.com

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