

5 *SPEEDY STEPS* TO AN EXCEL PIVOT TABLE



1

PUT YOUR DATA IN UNIQUE COLUMNS

CUSTOMER	MONTH	\$\$\$
Acme Inc	January	100,000
Demo Company	February	25,000
ABC Telecom	March	288,000

This is the most important step and 95% of Excel users suffer and give up on creating a Pivot Table because they cannot get this step right. It is super easy if you follow these 3 criteria:

HOW TO

- 1 Each column has to have a **unique header name**
- 2 Make sure that **there are no empty columns**
- 3 Each cell has to **have data in it & no blank cells or rows are allowed**

The image shows a laptop screen with an Excel spreadsheet. The spreadsheet has four columns: A (CUSTOMER), B (SALES DATE), C (SALES MONTH), and D (SALES). The data is as follows:

	A	B	C	D
1	CUSTOMER	SALES DATE	SALES MONTH	SALES
2	Acme, inc.	01/14/2016	January	188,394
3	Acme, inc.	03/28/2016	March	125,280
4	123 Warehousing	06/15/2016	June	32,661
5	Demo Company	08/10/2016	August	89,657
6	Demo Company	10/25/2016	October	179,846
7	Foo Bars	11/11/2016	November	149,011
8	ABC Telecom	12/25/2016	December	128,506
9				
10				

Callouts on the screen indicate: 1 points to the 'CUSTOMER' header, 2 points to the 'SALES MONTH' header, and 3 points to the 'ABC Telecom' data row.

TIP: Do not include Month names as a unique header names.

2

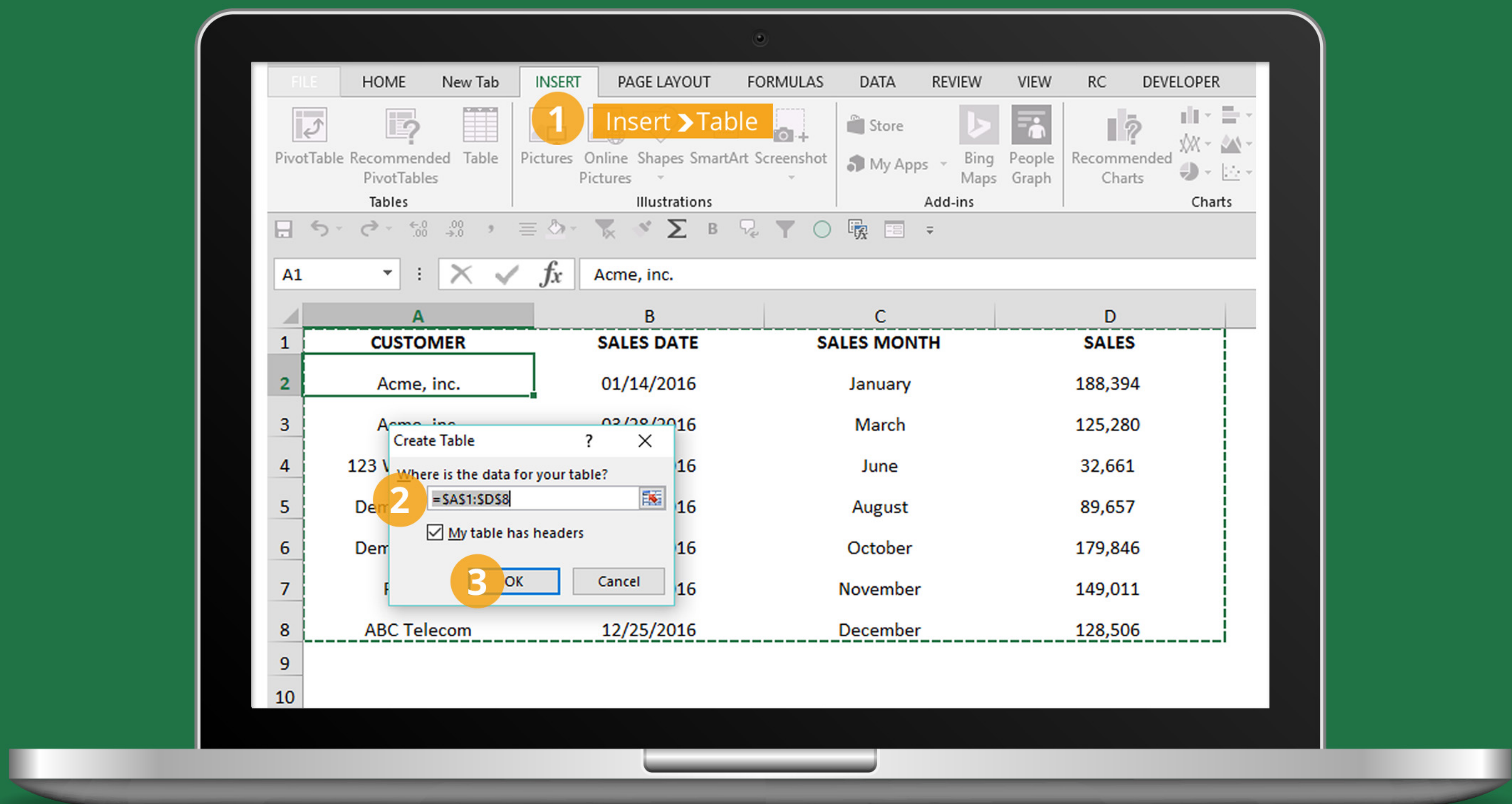
PUT YOUR DATA IN AN EXCEL TABLE

CUSTOMER ▾	MONTH ▾	SALES ▾
Acme Inc	January	100,000
Demo Company	February	25,000
ABC Telecom	March	288,000

To get the most out of a Pivot Table, your data has to be in an Excel Table

HOW TO

- 1 Click anywhere in your data and go to **Insert > Table (CTRL + T)**
- 2 Make sure that all your **data is selected** and that the **table headers is checked**
- 3 Press **OK** to create your Excel Table



TIP: To insert an Excel Table using your keyboard shortcuts, press CTRL T (Windows) ⌘T (Mac)

Ctrl

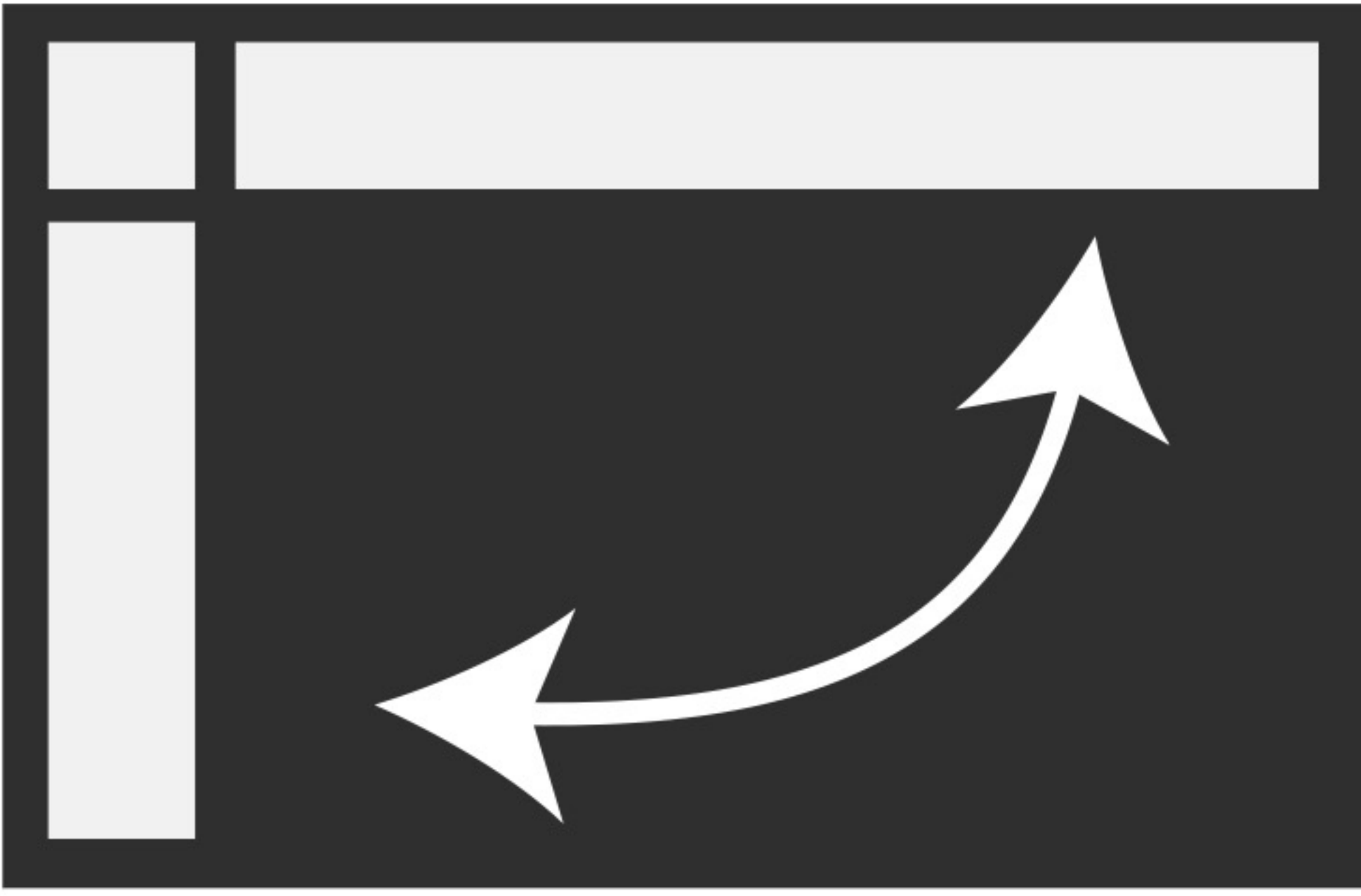
T

⌘

T

3

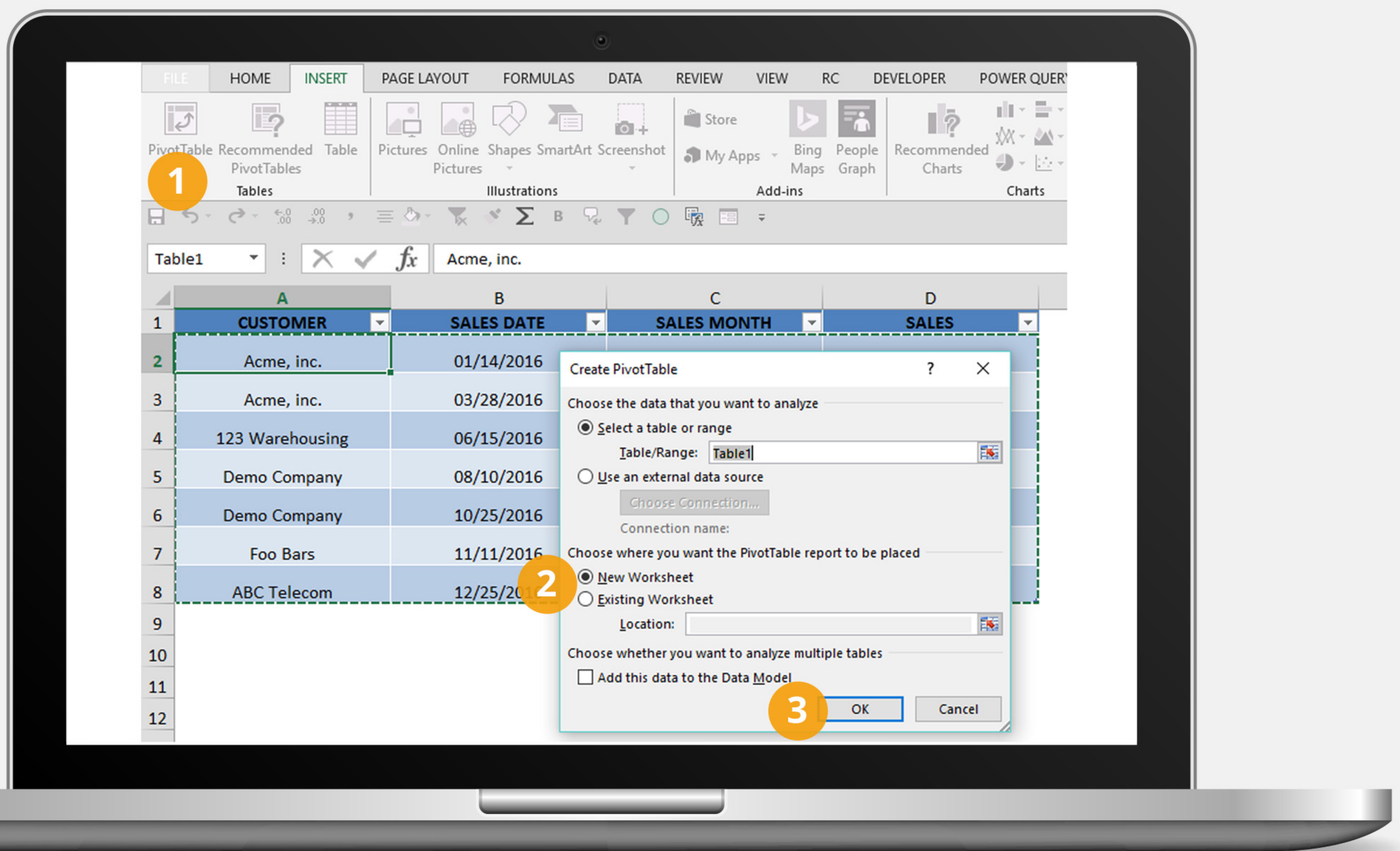
INSERT THE PIVOT TABLE



You are one step away from inserting your first Pivot Table which will launch you into an analytical world and supercharge you with Excel superpowers!

HOW TO

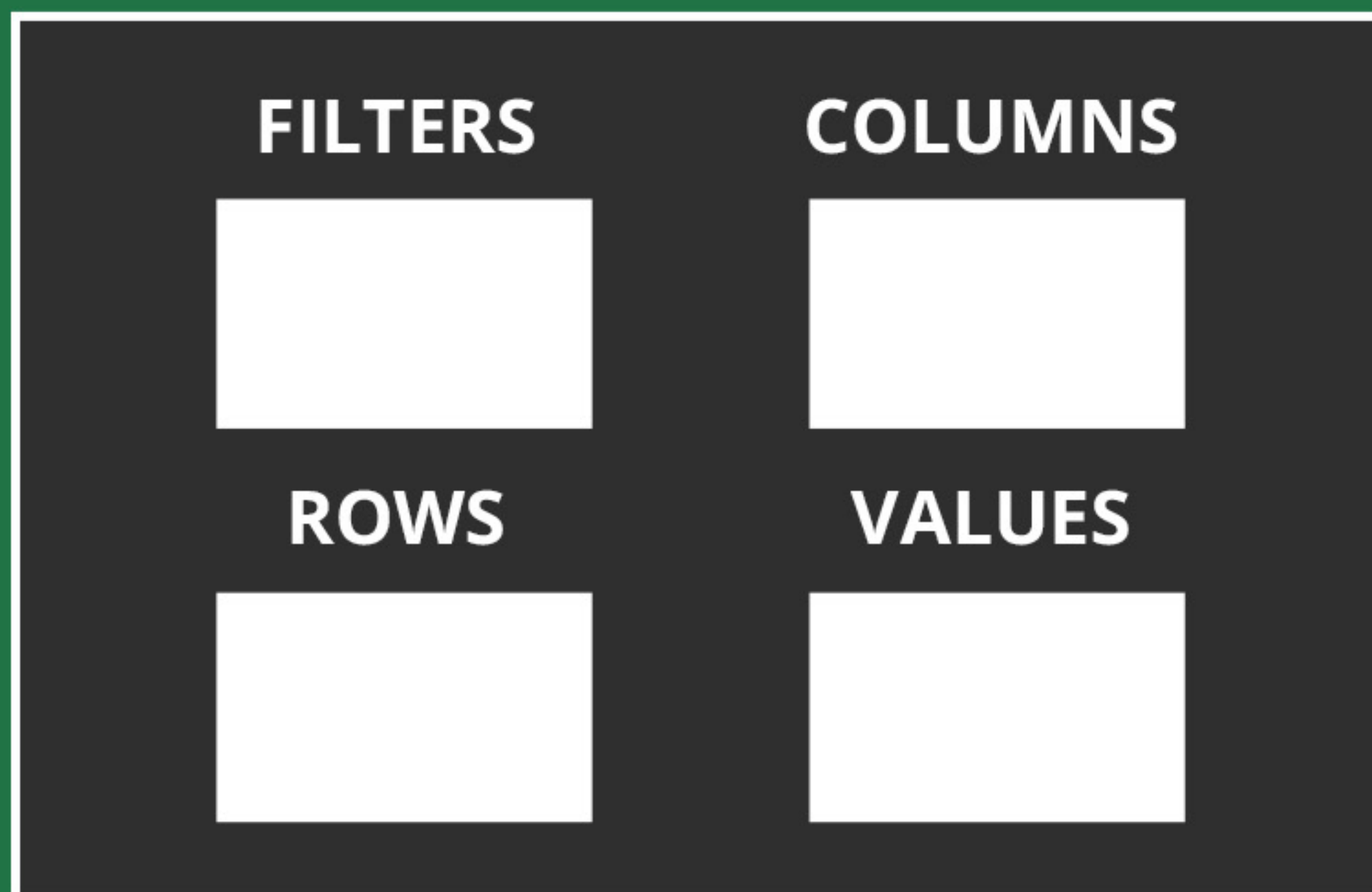
- 1 Click anywhere in your Excel Table and go to **Insert > PivotTable**
- 2 From the Create PivotTable pop-up box, choose **New Worksheet**
- 3 Press **OK**



TIP: To insert a Pivot Table in a Mac, you need to go to the Data tab and select the Pivot Table from within there.

4

ROWS, COLUMNS, FILTERS AND VALUES



Drag and drop the PivotTable Fields into the different areas below to create your awesome Pivot Table

HOW TO

Row Labels:

Shows unique values from that Field down the rows of the left side of the Pivot Table.

Fields normally include:

Customers, Products, Names & Locations.

Values:

Shows the calculations of your value Fields.

Fields normally include:

Sales, Units, Measures.

Column Labels:

Shows trending over time.

Fields normally include:

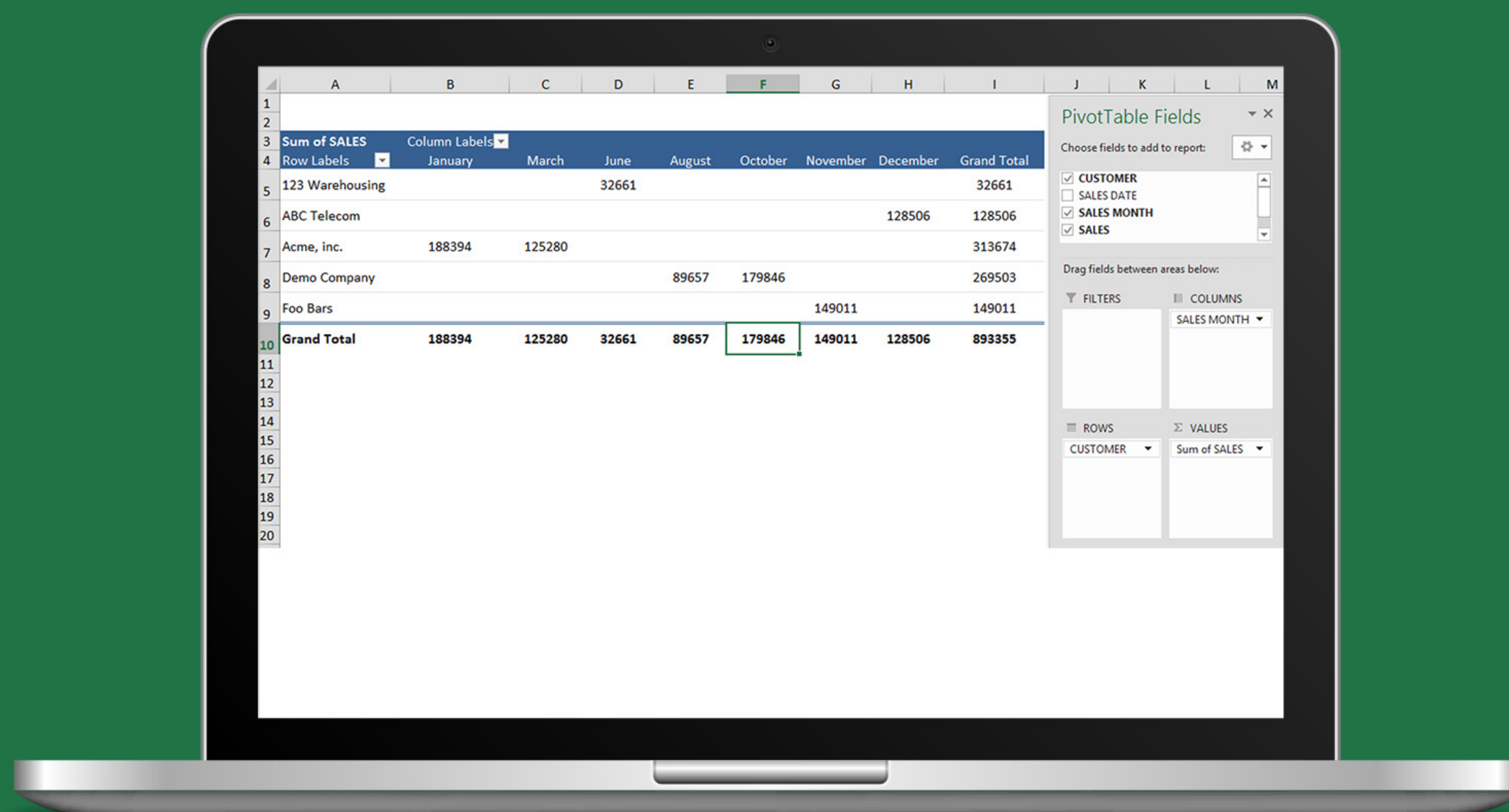
Dates, Months, Years & Time.

Filters:

This is optional and includes any Pivot Table Field that you want to drill down on.

Fields normally include:

Customers, Products, Names, Locations, Dates, Months, Years & Time.



TIP: You can drag the Fields between the Filters, Column, Rows and Values areas to get your perfect Pivot Table layout!

5

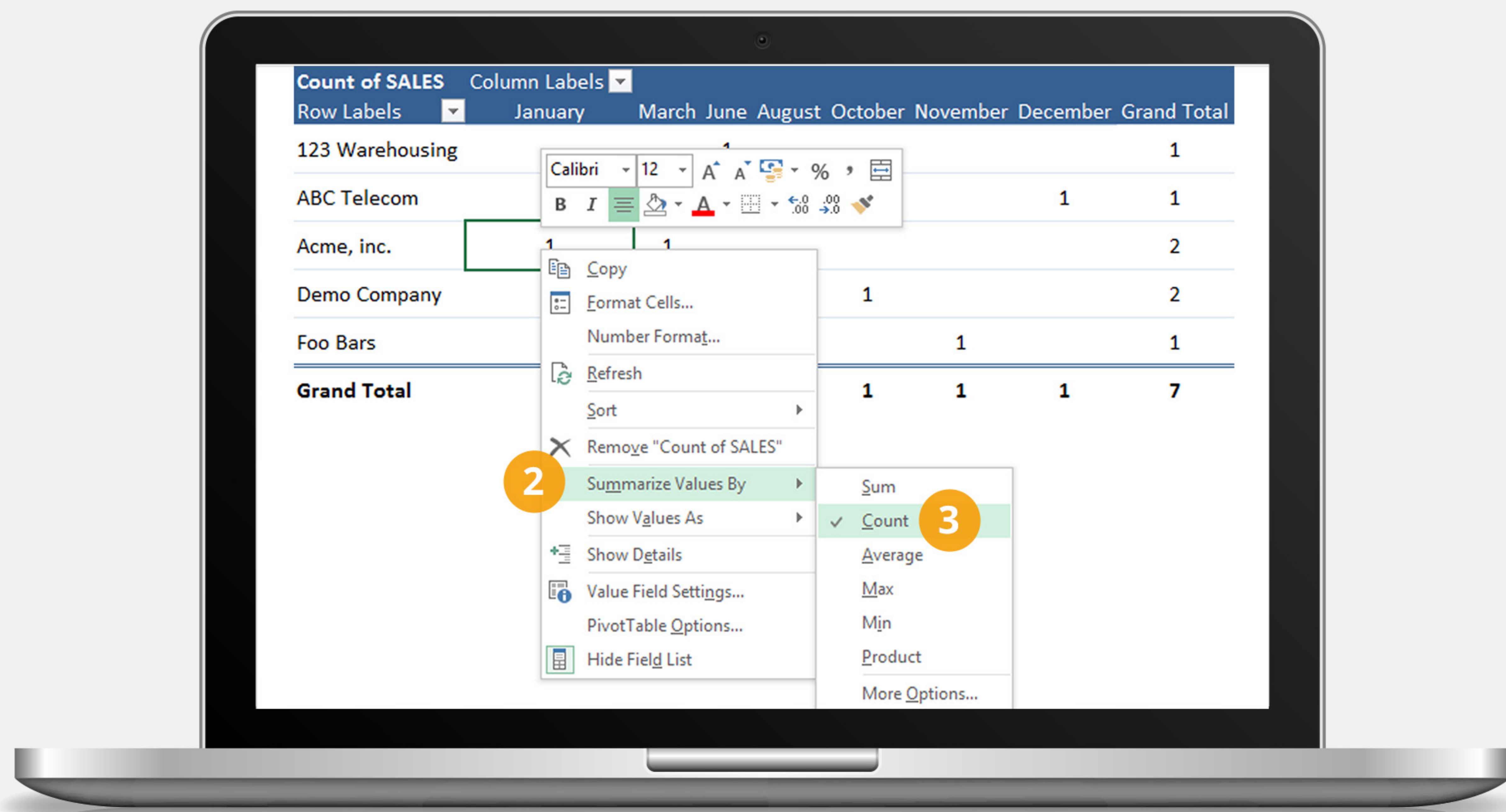
SHOW YOUR VALUES AS A SUM, COUNT, AVERAGE, MAX, MIN ETC.

X X X
X X X
= XXX

You can show the Pivot Table values as either a Sum (the default value), Count, Average, Maximum or Minimum.

HOW TO

- 1 **Right Click on a value** within your Pivot Table
- 2 Select **Summarize Values By**
- 3 Choose from Sum, Count, Average, Max, Min or Product (choose **More Options** for more calculations)



TIP: You can also change the values by clicking on the Values drop down (from the Pivot Table Field List) and selecting Value Field Settings.

If you want to learn more about Pivot Tables, join us in our FREE 1 hour Pivot Table webinar by clicking here now or pasting the following url in your web browser:
www.myexcelonline.com/pivottable-webinar