

Calculated Field/Item in Excel

This example teaches you how to insert a calculated field or calculated item in a pivot table.

Below you can find a pivot table. Go back to [Pivot Tables](#) to learn how to create this pivot table.

	A	B	C
1			
2			
3	Row Labels	Sum of Amount	
4	Australia	131713	
5	Canada	94745	
6	France	141056	
7	Germany	155168	
8	New Zealand	66782	
9	United Kingdom	173137	
10	United States	267133	
11	Grand Total	1029734	
12			

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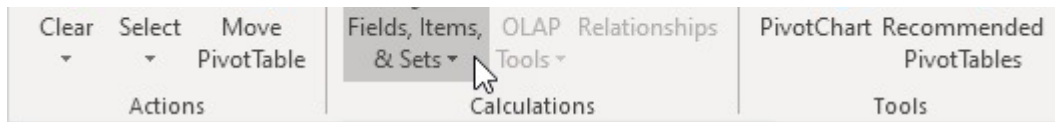
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◆ Calculated Field

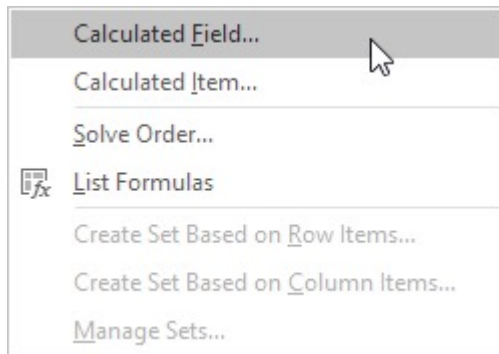
A calculated field uses the values from another field. To insert a calculated field, execute the following steps.

1. Click any cell inside the pivot table.
2. On the PivotTable Analyze tab, in the Calculations group, click Fields, Items & Sets.





3. Click Calculated Field.

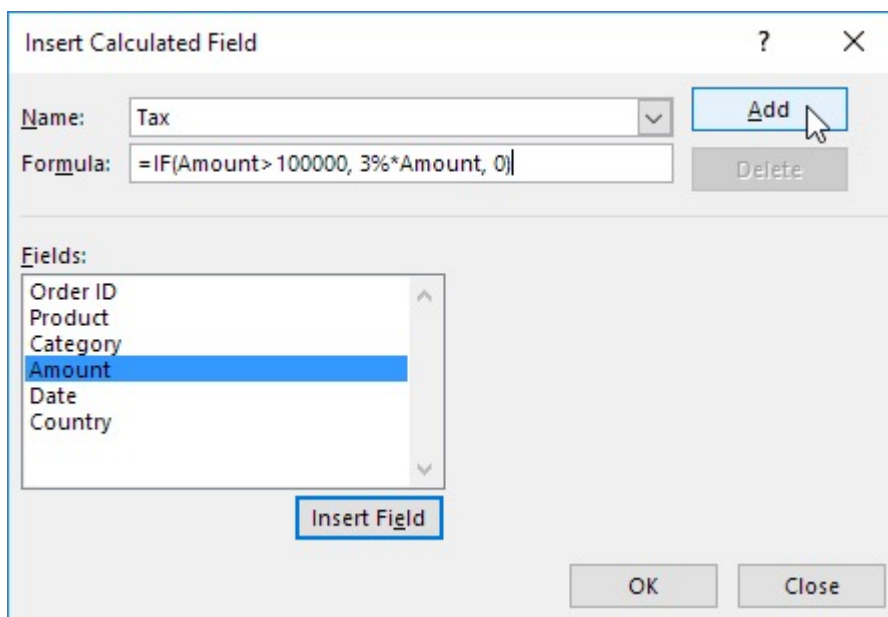


The Insert Calculated Field dialog box appears.

4. Enter Tax for Name.

5. Type the formula =IF(Amount>100000, 3%*Amount, 0)

6. Click Add.



Note: use the Insert Field button to quickly insert fields when you type a formula. To delete a calculated field, select the field and click Delete (under Add).

7. Click OK.

Excel automatically adds the Tax field to the Values area.

Result:

	A	B	C	D
1				
2				
3	Row Labels	Sum of Amount	Sum of Tax	
4	Australia	131713	\$3,951	

5	Canada	94745	\$0	
6	France	141056	\$4,232	
7	Germany	155168	\$4,655	
8	New Zealand	66782	\$0	
9	United Kingdom	173137	\$5,194	
10	United States	267133	\$8,014	
11	Grand Total	1029734	\$30,892	
12				

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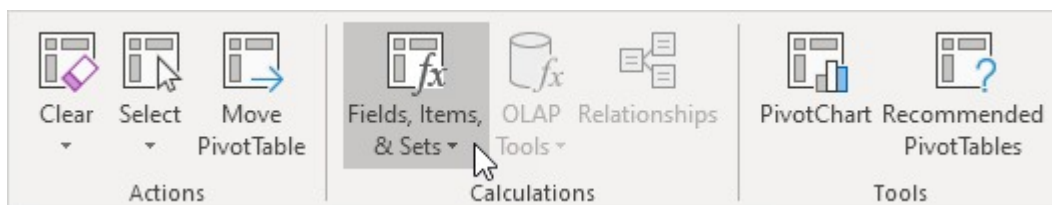
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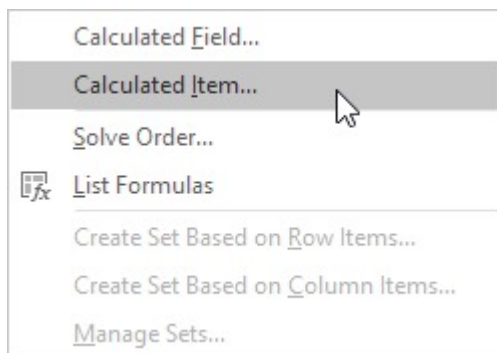
◆ Calculated Item

A calculated item uses the values from other items. To insert a calculated item, execute the following steps.

1. Click any Country in the pivot table.
2. On the PivotTable Analyze tab, in the Calculations group, click Fields, Items & Sets.



3. Click Calculated Item.



The Insert Calculated Item dialog box appears.

4. Enter Oceania for Name.

5. Type the formula =3%*(Australia+'New Zealand')

6. Click Add.

Insert Calculated Item in "Country"

Name: Oceania Add

Formula: =3%*(Australia+'New Zealand') Delete

Fields: Order ID, Product, Category, Amount, Date, Country

Items: Australia, Canada, France, Germany, New Zealand, United Kingdom, United States

Insert Field Insert Item

OK Close

Note: use the Insert Item button to quickly insert items when you type a formula. To delete a calculated item, select the item and click Delete (under Add).

7. Repeat steps 4 to 6 for North America (Canada and United States) and Europe (France, Germany and United Kingdom) with a 4% and 5% tax rate respectively.

8. Click OK.

Result:

	A	B	C
1			
2			
3	Row Labels	Sum of Amount	
4	Sales	1029734	
5	Australia	131713	
6	Canada	94745	
7	France	141056	
8	Germany	155168	
9	New Zealand	66782	
10	United Kingdom	173137	
11	United States	267133	
12	Taxes	43898	
13	Oceania	5955	
14	North America	14475	
15	Europe	23468	
16	Grand Total	1073632	
17			

Note: we created two groups (Sales and Taxes).

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