Pivot Tables in Excel

Pivot tables are one of Excel's most powerful features. A pivot table allows you to extract the significance from a large, detailed data set.

Our data set consists of 213 records and 6 fields. Order ID, Product, Category, Amount, Date and Country.

|	A	B	C	D	E	F	G	H
1	Order ID	Product	Category	Amount	Date	Country		
2	1	Carrots	Vegetables	$4,270	1/6/2024	United States		
3	2	Broccoli	Vegetables	$8,239	1/7/2024	United Kingdom		
4	3	Banana	Fruit	$617	1/8/2024	United States		
5	4	Banana	Fruit	$8,384	1/10/2024	Canada		
6	5	Beans	Vegetables	$2,626	1/10/2024	Germany		
7	6	Orange	Fruit	$3,610	1/11/2024	United States		
8	7	Broccoli	Vegetables	$9,062	1/11/2024	Australia		
9	8	Banana	Fruit	$6,906	1/16/2024	New Zealand		
10	9	Apple	Fruit	$2,417	1/16/2024	France		
11	10	Apple	Fruit	$7,431	1/16/2024	Canada		

✦ Insert a Pivot Table

To insert a pivot table, execute the following steps.

1. Click any single cell inside the data set.

2. On the Insert tab, in the Tables group, click PivotTable.

PivotTable Recommended Table
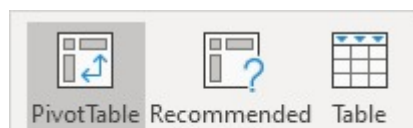
The following dialog box appears. Excel automatically selects the data for you. The default location for a new pivot table is New Worksheet.
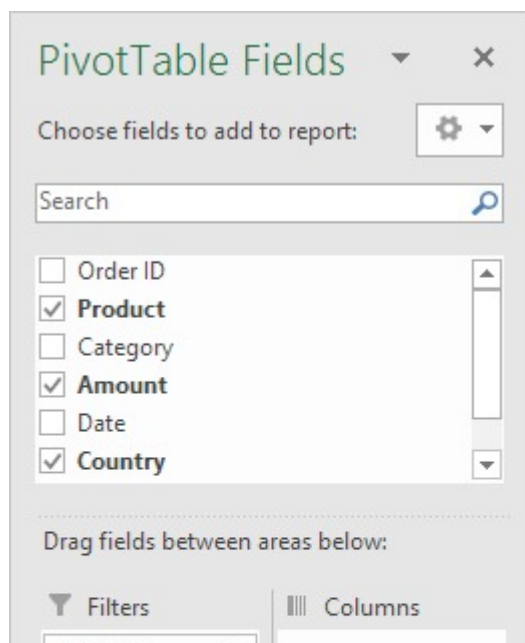
3. Click OK.
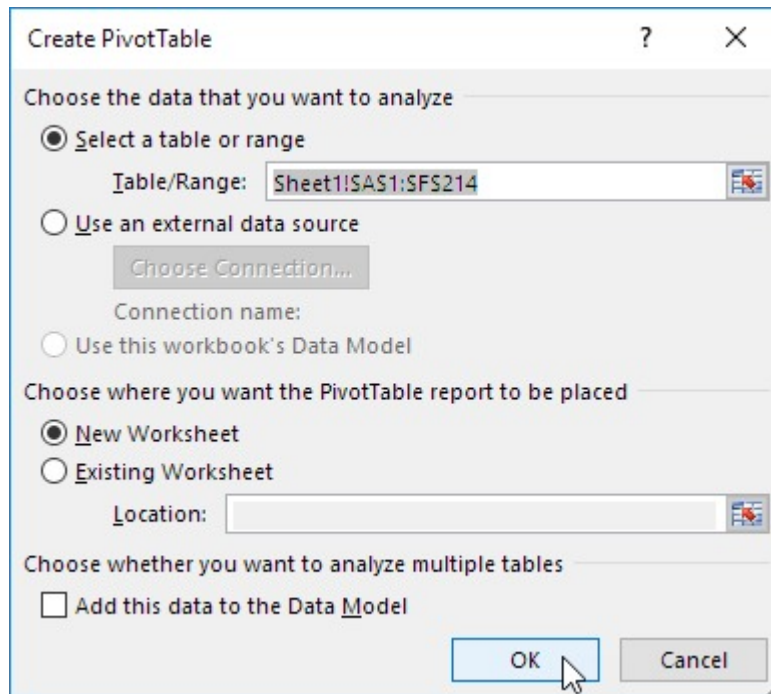
✦ Drag fields

The PivotTable Fields pane appears. To get the total amount exported of each product, drag the following fields to the different areas.

1. Product field to the Rows area.

2. Amount field to the Values area.

3. Country field to the Filters area.

Below you can find the pivot table. Bananas are our main export product. That's how easy pivot tables can be!

	A	B	C
1	Country	(All)	
2			
3	Row Labels	Sum of Amount	
4	Apple	191257	
5	Banana	340295	
6	Beans	57281	
7	Broccoli	142439	
8	Carrots	136945	
9	Mango	57079	
10	Orange	104438	
11	Grand Total	1029734	
12			

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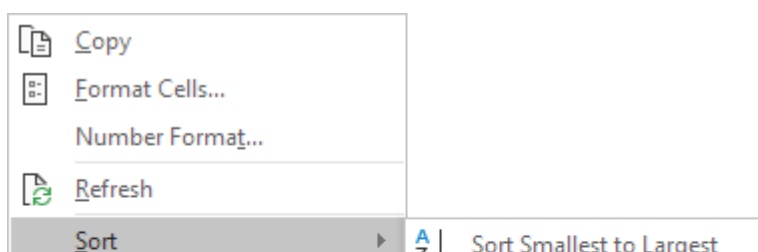Data analysis course >
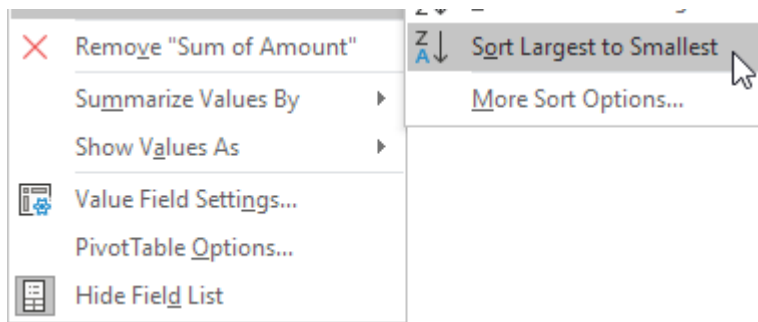
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✦ Sort a Pivot Table

To get Banana at the top of the list, sort the pivot table.

1. Click any cell inside the Sum of Amount column.

2. Right click and click on Sort, Sort Largest to Smallest.

	Column 1	Column 2	Column 3
×	Remove "Sum of Amount"	↓ Sort Largest to Smallest	
	Summarize Values By ▶	More Sort Options...	
	Show Values As ▶		
⊞	Value Field Settings...		
	PivotTable Options...		
⊞	Hide Field List		

Result:

	A	B	C
1	Country	(All) ▼	
2			
3	Row Labels ↓	Sum of Amount	
4	Banana	340295	
5	Apple	191257	
6	Broccoli	142439	
7	Carrots	136945	
8	Orange	104438	
9	Beans	57281	
10	Mango	57079	
11	**Grand Total**	**1029734**	
12			

✦ Filter a Pivot Table

Because we added the Country field to the Filters area, we can filter this pivot table by Country. For example, which products do we export the most to France?

1. Click the filter drop-down and select France.

Result: Apples are our main export product to France.

	A	B	C
1	Country	France ▼▼	
2			
3	Row Labels ↓	Sum of Amount	
4	Apple	80193	
5	Banana	36094	
6	Carrots	9104	
7	Mango	7388	
8	Broccoli	5341	
9	Orange	2256	
10	Beans	680	
11	**Grand Total**	**141056**	
12			

Note: you can use the standard filter (triangle next to Row Labels) to only show the amounts of specific products.

✦ Change Summary Calculation

By default, Excel summarizes your data by either summing or counting the items. To change the type of calculation that you want to use, execute the following steps.

1. Click any cell inside the Sum of Amount column.

2. Right click and click on Value Field Settings.

3. Choose the type of calculation you want to use. For example, click Count.

4. Click OK.

Result: 16 out of the 28 orders to France were 'Apple' orders.

✦ Two-dimensional Pivot Table

If you drag a field to the Rows area and Columns area, you can create a two-dimensional pivot table. First, insert a pivot table. Next, to get the total amount exported to each country, of each product, drag the following fields to the different areas.

1. Country field to the Rows area.

2. Product field to the Columns area.

3. Amount field to the Values area.

4. Category field to the Filters area.

Below you can find the two-dimensional pivot table.

✦ Pivot Chart

To easily compare these numbers, create a pivot chart and apply a filter. Maybe this is one step too far for you at this stage, but it shows you one of the many other powerful pivot table features Excel has to offer.

Chapter

- Pivot Tables

↓ Download Excel File

- pivot-tables.xlsx

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