Excel Pivot Table Assignment

This document contains all the steps taken to answer the questions of the assignment.

1. Creating a Pivot Table – Total Revenue by Region

Steps Taken:

1. Selected the entire dataset.
2. Went to **Insert → PivotTable** and chose a location to add the pivot table in the existing worksheet.
3. Dragged **Region** to **Rows**.
4. Dragged **Revenue ($)** to **Values** (checked it shows **Sum of Revenue**).
5. Formatted values as currency for clarity.

Result: Pivot Table displays **total revenue for each region**.

2. Filtering Data – Show Only Electronics Sales

Steps Taken:

1. Added **Category** to the **Filters** area in the Pivot Table.
2. Clicked the dropdown for **Category** and selected **Electronics**.

Result: Pivot Table shows **only sales from the Electronics category**.

3. Sorting Revenue in Descending Order

Steps Taken:

1. Clicked any value in **Sum of Revenue ($)**.
2. Right-clicked → **Sort → Largest to Smallest**.

Result: Regions are now sorted with **highest revenue at the top**.

4. Grouping Data by Month

Steps Taken:

1. Dragged **Date** field to **Rows**.
2. Right-clicked any date → **Group → Months** (and optionally **Years**).
3. Added **Revenue ($)** to **Values**.

Result: Pivot Table now shows **month-wise revenue trends**, useful for analyzing seasonality.

5. Adding a Calculated Field – Profit

Steps Taken:

1. Clicked inside the Pivot Table → **PivotTable Analyze → Fields, Items & Sets → Calculated Field**.
2. Named it **Profit**.

3. Entered formula: = 'Revenue ($)' - 'Cost ($)'.
4. Clicked **Add → OK**.

Result: Pivot Table now shows **Profit for each salesperson**.

6. Using Slicers for Interactive Filtering – Salesperson

Steps Taken:

1. Clicked inside the Pivot Table → **PivotTable Analyze → Insert Slicer**.
2. Selected **Salesperson** → OK.
3. Clicked names in the slicer to filter multiple salespersons interactively.

Result: Quickly compared **performance of different salespersons**.

7. Identifying the Best-Selling Product Category

Steps Taken:

1. Dragged **Category** to **Rows** and **Revenue ($)** to **Values**.
2. Sorted **Sum of Revenue ($)** in **Descending Order**.

Result: Top row shows the **category with the highest total revenue**.

8. Applying Conditional Formatting – Revenue > $1,500

Steps Taken:

1. Selected **Revenue ($) column** in the dataset (row-level).
2. Went to **Home → Conditional Formatting → Highlight Cells Rules → Greater Than**.
3. Entered 1500 → applied a light red fill.

Result: All transactions with **Revenue > $1,500** are highlighted.

9. Creating a Pivot Chart – Revenue by Product Category

Steps Taken:

1. Clicked inside the Pivot Table → **PivotTable Analyze → PivotChart**.
2. Selected **Clustered Column Chart** → OK.
3. X-axis: Product Category, Y-axis: Revenue ($).

Result: Visual comparison of revenue by category in a **clear, column chart**.

10. Refreshing the Pivot Table

Steps Taken:

1. Added new transactions to the dataset.

2. Clicked inside the Pivot Table → **Right-click → Refresh**.
3. (Optional) Converted dataset to an **Excel Table** for automatic range updates.

Result: Pivot Table now reflects **all new transactions**.