



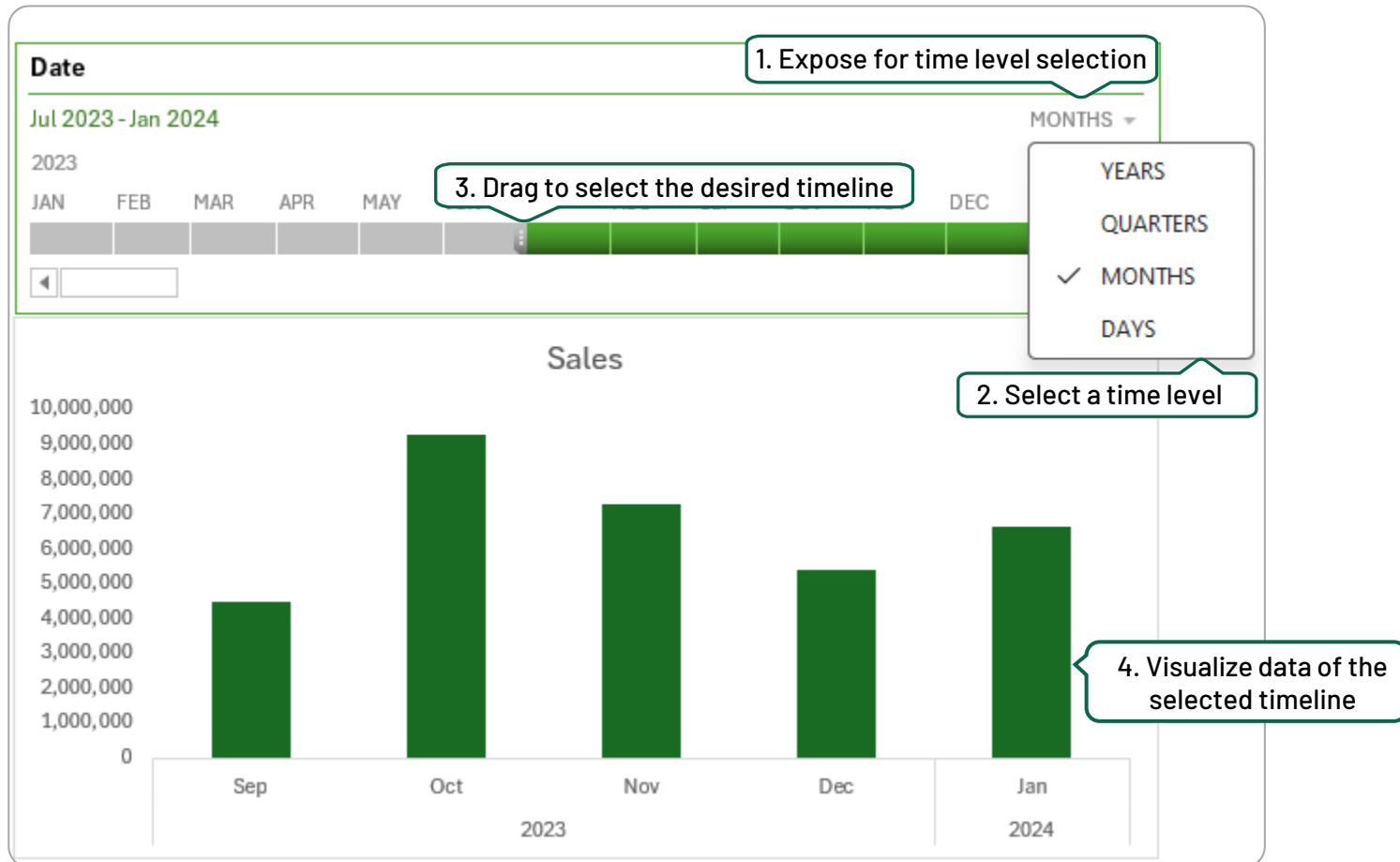
8 PIVOTTABLE TRICKS CHEAT SHEET



PivotTable Tricks Video & Practice File: <https://bit.ly/pivottablefile24>

1 Timeline Slicer: Easily filter data across date

How to: Insert tab > Timeline



2 Calculated Fields: Perform custom calculations directly in your PivotTable

How to: PivotTable Analyze > Fields, Items, & Sets > Calculated Field

Date	Segment	Country	Product	Units Sold	Sales	COGS
1/1/2024	Government	Canada	Carretera	1619	32,370.00	16,185.00
1/1/2024	Government	Germany	Carretera	1321	26,420.00	13,210.00
1/1/2024	Government	Mexico	Velo	1493	10,451.00	7,465.00
1/1/2024	Government	France	Paseo	3945	27,338.85	19,725.00
1/1/2024	Small Business	France	Paseo	2435	708,439.50	608,625.00
1/1/2024	Channel Partners	Germany	VTT	2479	28,855.56	7,437.00
1/1/2024	Government	Canada	Paseo	4251	28,566.72	21,255.00

Keep the original data source intact & minimize file size

Row Labels	Sales	COGS	Gross Profit
Amarilla	16,965,992	14,218,692	2,747,300
Carretera	12,090,364	10,686,683	1,403,681
Montana	14,170,585	12,202,547	1,968,038
Paseo	31,056,393	26,424,531	4,631,862
Velo	17,449,456	15,248,286	2,201,170
VTT	17,276,146	14,862,958	2,413,188
Grand Total	109,008,937	93,643,697	15,365,240

Add the calculated field to the PivotTable

Insert Calculated Field

Name: Gross Profit

Formula: = Sales - COGS

Fields:

- Date
- Segment
- Country
- Product
- Units Sold
- Sales
- COGS
- Gross Profit

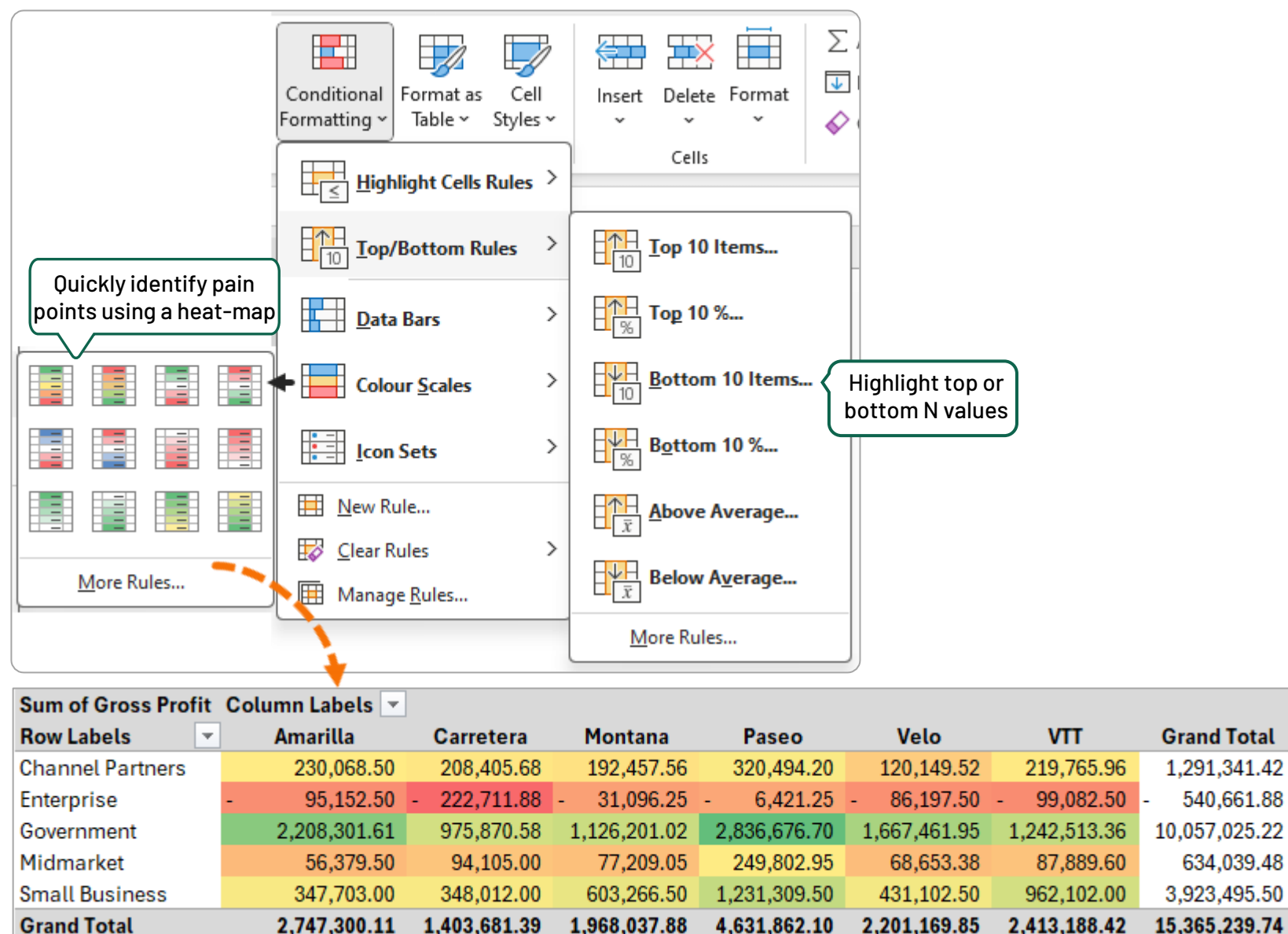
Insert Field

OK Close

Create an on-the-fly calculated field

3 Conditional Formatting: Apply visual cues to your PivotTable data

How to: Home tab > Conditional Formatting > Colour Scales or Top/Bottom Rules



4 MoM, QoQ & YoY Analysis: Compare performance to prior periods

How to: Right-click on any cell in Sum of Sales 2 column > Select 'Show Value As' > Select 'Difference From' > Select values for 'Base Field' & 'Base Item'

Row Labels	Sum of Sales	Sum of Sales 2
Jan	6,607,762	6,607,762
Feb	7,297,531	7,297,531
Mar	5,586,860	5,586,860
Apr	6,964,775	6,964,775
May	6,210,211	6,210,211
Jun	9,518,894	9,518,894
Jul	8,102,920	8,102,920
Aug	5,864,622	5,864,622
Sep	6,398,697	6,398,697
Oct	6,411,417	6,411,417
Nov	5,384,214	5,384,214
Dec	8,245,777	8,245,777
Grand Total	82,593,681	82,593,681

Rename Column

Row Labels	Sales	MoM
Jan	6,607,762	
Feb	7,297,531	689,770
Mar	5,586,860	-1,710,671
Apr	6,964,775	1,377,915
May	6,210,211	-754,564
Jun	9,518,894	3,308,683
Jul	8,102,920	-1,415,974
Aug	5,864,622	-2,238,298
Sep	6,398,697	534,075
Oct	6,411,417	12,720
Nov	5,384,214	-1,027,203
Dec	8,245,777	2,861,563
Grand Total	82,593,681	

Add the same field twice

Comparison values will be calculated

Select desired time frame

Select comparison period

5 Drill Down: See underlying transactions behind values

Row Labels	Sales
Canada	22,830,784
France	21,765,623
Germany	21,237,462
Mexico	19,552,713
USA	23,622,355
Grand Total	109,008,937

How to:



Double-click on any value field in a PivotTable

6 Report Pages: Automatically generate separate PivotTable reports for each filter item, such as each country or department.

Country	(All)
Row Labels	Sales
Channel Partners	1,765,466
Enterprise	18,323,698
Government	46,802,088
Midmarket	2,279,189
Small Business	39,838,496
Grand Total	109,008,937

Country	Canada
Row Labels	Sum of Sales
Channel Partners	475,935
Enterprise	3,723,900
Government	9,358,824
Midmarket	480,544
Small Business	8,791,581
Grand Total	22,830,784

How to:

PivotTable Analyze > Options > Show Report Filter Pages

Generate a new sheet for each country, to be shared with the corresponding stakeholders.

Benefit

7 Slicer Connections: Single slicer filters multiple PivotTables

How to:

Right-click on the slicer > Select 'Report Connections' > Check Multiple PivotTables

8 Custom Sorting: Sort PivotTable row labels

How to:

Left-click a row label > drag it upward or downward to reorder

