Excel Pivot Tables and Power & Power Query

1. A Pivot Table allows you to get answers from the data without writing complex calculations.

2. It is very fast to create a pivot table in excel.

3. It helps you find relationships between the data.

4. Visualize data with dynamic charts.

3 Simple Rules

1. Each column has a header.

2. There are no empty columns in between the first and last column.

3. There are no totals in the middle of your data set.
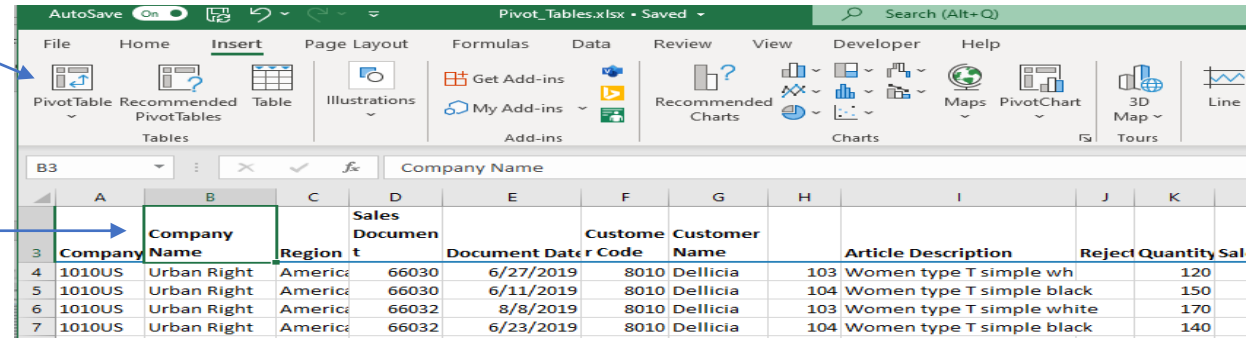
Pivot Table Raw Data

The data from A3 To L108 is called the Dataset.

This is an invalid data set because Column H does not have a description.

1. Go to insert on the menu and on the far left side click the Pivot Table option.

2. If you have a cell highlighted in the dataset when you press the button excel will attempt to determine what cells need to be included.

Excel automatically filled in the range.

You can also choose where you would like your Pivot table to be placed.
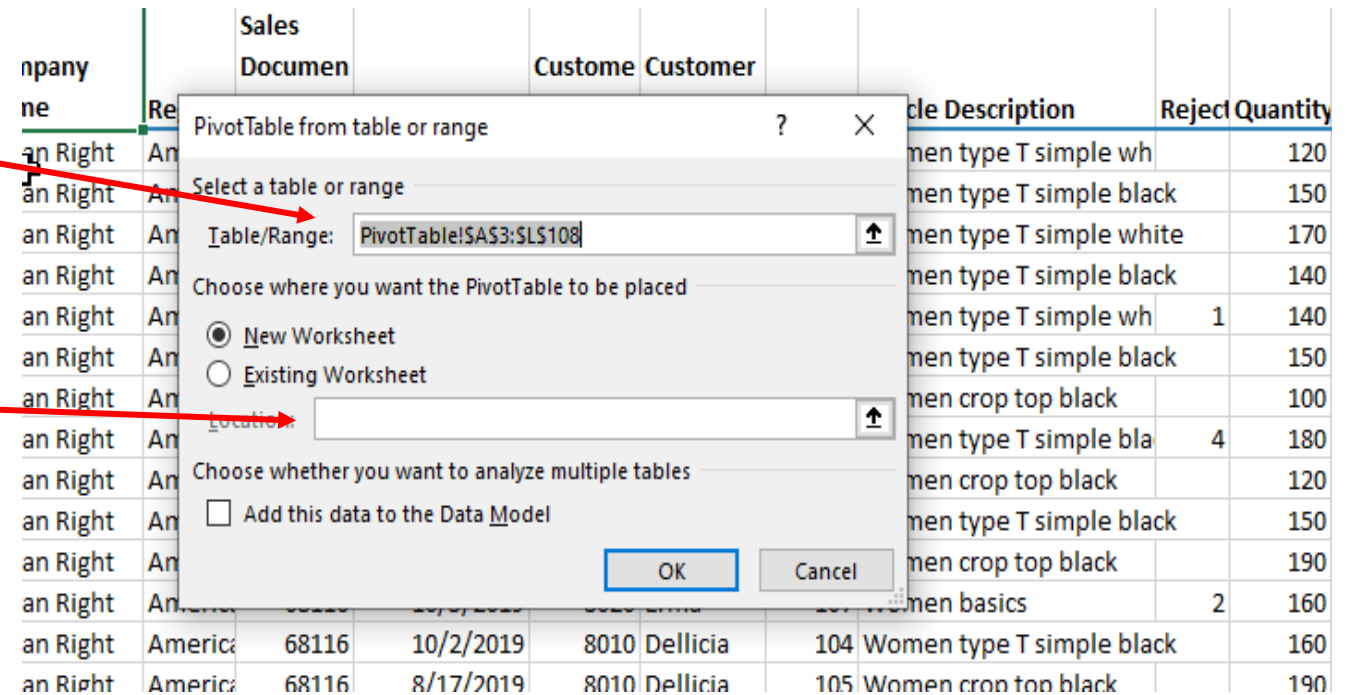
I chose existing worksheet and clicked on cell O7
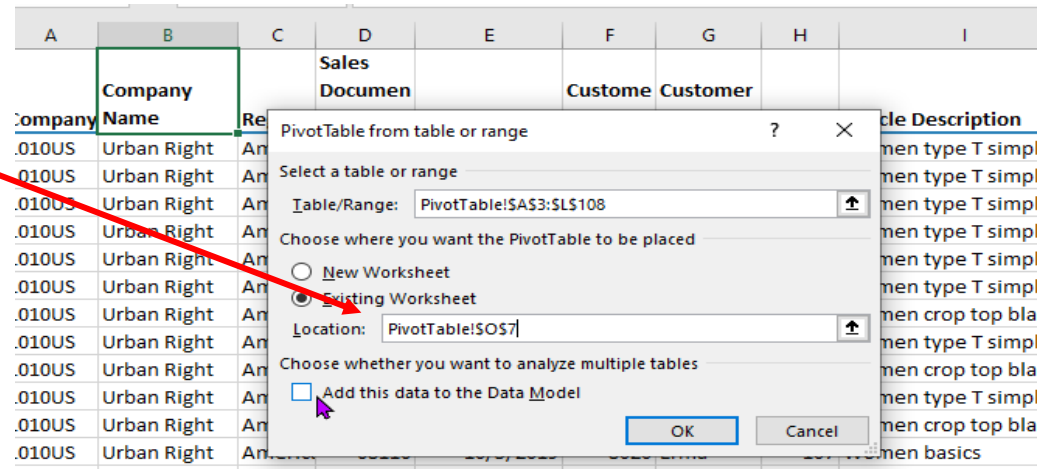
We get the following error because there is no description in column H.

The PivotTable field name is not valid. To create a PivotTable report, you must use data that is organized as a list with labeled columns. If you are changing the name of a PivotTable field, you must type a new name for the field.
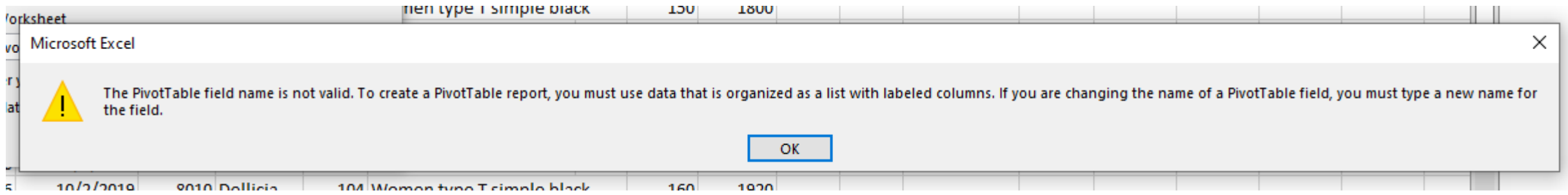
Add the SKU Num to column H.

You will get the following Pivot Tables Field List.

1. Here you can set up what you want the pivot table to look like.

You will also see two new menu items

As you check the fields you want in your Pivot Table you will see the table being built as each selection is completed. That is all there is to creating a Pivot Table.

| | Filter | | Data | | Actions | | Calculations | | Tools | | Show | |

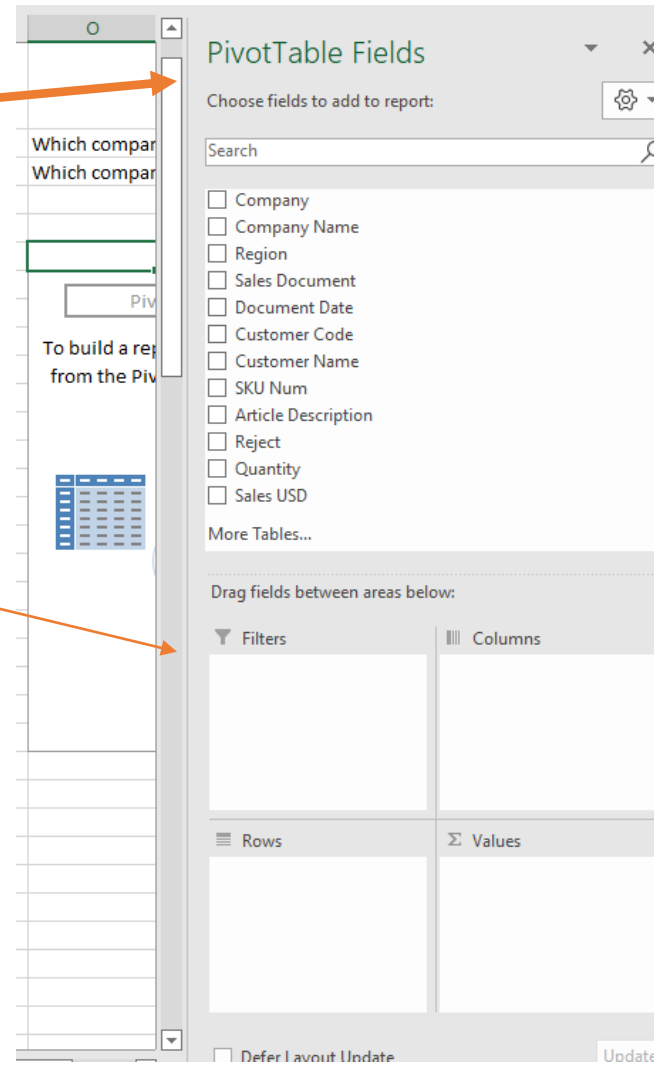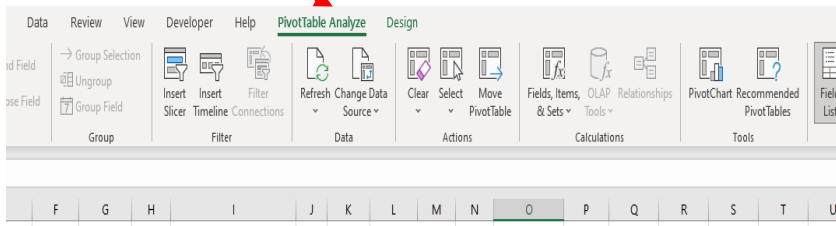|	I	J	K	L	M	N	O	P	Q	R	S	T	U	V

PivotTable Fields

Choose fields to add to report:

Search

☐	Article Description		
☐	Company		
☑	**Company Name**		
☐	Customer Code		
☐	Customer Name		
☐	Document Date		
☑	**Quantity**		
☐	Region		
☐	Reject		
☐	Sales Document		
☑	**Sales USD**		
☐	SKU Num		

More Tables...

Spreadsheet data:

rticle Description	Rejecl	Quantity	Sales USD
'omen type T simple wh		120	1440
'omen type T simple black		150	1800
'omen type T simple white		170	2040
'omen type T simple black		140	1680
'omen type T simple wh		140	1680
'omen type T simple black		150	1800
'omen crop top black		100	1000
'omen type T simple bla	4	180	2160
'omen crop top black		120	1200
'omen type T simple black		150	1800
'omen crop top black		190	1900
'omen basics	2	160	800
'omen type T simple black		160	1920
'omen crop top black		190	1900
'omen type T simple white		120	1440

Which company sells the most (volume)?
Which company sells the most (USD)?

Row Labels	Sum of Quantity	Sum of Sales USD
Lucas Basics	2610	104540
Meta Creations	1260	19640
Urban Right	6120	66100
Grand Total	**9990**	**190280**

Drag fields between areas below:

▼ Filters	▥ Columns
	Σ Values

≡ Rows	Σ Values
Company Na... ▼	Sum of Quantity ▼
	Sum of Sales ... ▼

Note: Excel Automatically placed the Company Name in the Rows and the numeric values in the Values Box. You can overwrite this if needed.

You can change the Format Of the Pivot Table by clicking Format Table on the Ribbon or by clicking the Design Menu Item.

When adjusting number formatting do not choose Format Cells inside the Pivot Table but choose the Number Formatting Option in the Formatting tool when you right click.

If you want to see the raw data you can double click a number
And Excel will open a new spreadsheet with only that items data in it.

Row Labels	Sum of Quantity	Sum of Sales USD
Lucas Basics	$2,610.00	104540
Meta Creations	$1,260.00	19640
Urban Right	$6,120.00	66100
Grand Total	$9,990.00	190280

Now let's answer the following question:
What were each Companies Sales By Date?

To answer this question I would need to get the information by Document Date and Sales Document. I can add them into my query.

Row Labels	Sum of Quantity	Sum of Sales USD
Lucas Basics	$2,610.00	104540
Meta Creations	$1,260.00	19640
Urban Right	$6,120.00	66100
Grand Total	$9,990.00	190280

Row Labels	Sum of Sales Document	Sum of Quantity	Sum of Sales USD
⊟ Lucas Basics	1925931	2610	104540
⊞ May	139000	180	8170
⊞ Jun	319161	410	21740
⊞ Jul	458110	600	26090
⊞ Aug	504811	710	25020
⊞ Sep	271046	390	12060
⊞ Oct	233803	320	11460
⊟ Meta Creations	543091	1260	19640
⊞ May	28112	10	280
⊞ Jun	125646	240	3940
⊞ Jul	104438	230	4080
⊞ Aug	56224	120	1600
⊞ Sep	204641	580	7500
⊞ Oct	24030	80	2240
⊟ Urban Right	2796883	6120	66100
⊞ May	198064	400	4800
⊞ Jun	728929	1540	16680
⊞ Jul	263709	570	5310
⊞ Aug	734848	1680	18030
⊞ Sep	403713	830	9440
⊞ Oct	467620	1100	11840
Grand Total	5265905	9990	190280

Choose fields to add to report:

Search

- ☐ Company
- ☑ Company Name
- ☐ Region
- ☑ Sales Document
- ☑ Document Date
- ☐ Customer Code
- ☐ Customer Name
- ☐ SKU Num
- ☐ Article Description
- ☐ Reject
- ☑ Quantity
- ☑ Sales USD
- ☑ Months

More Tables...

Drag fields between areas below:

▼ Filters	▥ Columns
	Σ Values

☰ Rows	Σ Values
Company Name	Sum of Sales Document
Months	Sum of Quantity
Document Date	Sum of Sales USD

You can drill down by double clicking any of the numbers in the table and Excel will open a new spreadsheet.

Here is the result of the new spreadsheet.

Which company sells the most (volume)?
Which company sells the most (USD)?

Row Labels	Sum of Quantity	Sum of Sales USD
Lucas Basics	2610	104540
Meta Creations	1260	19640
Urban Right	6120	66100
Grand Total	9990	190280

Company	Company Name	Region	Sales Document	Document Date	Customer Code	Customer Name	SKU Num	Article Description	Reject	Quantity	Sales USD
1040DE	Lucas Basics	Europe	45431	7/22/2019	8050	Aida GmbH	108	Laptop bag black		60	1970
1040DE	Lucas Basics	Europe	45431	8/2/2019	8050	Aida GmbH	111	Smartphone case simple		60	1410
1040DE	Lucas Basics	Europe	45429	7/6/2019	8060	Liebher	110	Smartphone case diamond		50	3520
1040DE	Lucas Basics	Europe	45429	7/9/2019	8060	Liebher	109	Laptop bag red	2	80	2630
1040DE	Lucas Basics	Europe	45429	8/28/2019	8060	Liebher	108	Laptop bag black		80	2630
1040DE	Lucas Basics	Europe	45427	6/18/2019	8050	Aida GmbH	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	45427	9/26/2019	8050	Aida GmbH	108	Laptop bag black		70	2300
1040DE	Lucas Basics	Europe	48101	7/4/2019	8060	Liebher	110	Smartphone case diamond		50	3520
1040DE	Lucas Basics	Europe	48101	8/12/2019	8060	Liebher	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	48099	10/1/2019	8050	Aida GmbH	111	Smartphone case simple		60	1410
1040DE	Lucas Basics	Europe	48099	8/10/2019	8050	Aida GmbH	110	Smartphone case diamond		60	4230
1040DE	Lucas Basics	Europe	48099	7/20/2019	8050	Aida GmbH	109	Laptop bag red	1	60	1970
1040DE	Lucas Basics	Europe	48097	7/10/2019	8060	Liebher	110	Smartphone case diamond		70	4930
1040DE	Lucas Basics	Europe	48097	8/28/2019	8060	Liebher	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	44016	6/15/2019	8050	Aida GmbH	110	Smartphone case diamond		50	3520
1040DE	Lucas Basics	Europe	44016	9/22/2019	8050	Aida GmbH	109	Laptop bag red	1	60	1970
1040DE	Lucas Basics	Europe	44016	8/14/2019	8050	Aida GmbH	108	Laptop bag black		70	2300
1040DE	Lucas Basics	Europe	44017	9/14/2019	8060	Liebher	109	Laptop bag red		70	2300
1040DE	Lucas Basics	Europe	44017	6/17/2019	8060	Liebher	108	Laptop bag black		70	2300
1040DE	Lucas Basics	Europe	44015	7/1/2019	8060	Liebher	109	Laptop bag red		70	2300
1040DE	Lucas Basics	Europe	44015	8/13/2019	8060	Liebher	108	Laptop bag black		60	1970
1040DE	Lucas Basics	Europe	45446	7/3/2019	8050	Aida GmbH	108	Laptop bag black		50	1640
1040DE	Lucas Basics	Europe	45446	10/7/2019	8050	Aida GmbH	111	Smartphone case simple		80	1880
1040DE	Lucas Basics	Europe	45444	5/29/2019	8060	Liebher	110	Smartphone case diamond		60	4230
1040DE	Lucas Basics	Europe	45444	8/2/2019	8060	Liebher	109	Laptop bag red		70	2300
1040DE	Lucas Basics	Europe	45444	5/28/2019	8060	Liebher	108	Laptop bag black		60	1970
1040DE	Lucas Basics	Europe	45442	6/11/2019	8050	Aida GmbH	109	Laptop bag red	1	60	1970
1040DE	Lucas Basics	Europe	45442	9/28/2019	8050	Aida GmbH	108	Laptop bag black		50	1640
1040DE	Lucas Basics	Europe	48116	6/22/2019	8060	Liebher	110	Smartphone case diamond		60	4230
1040DE	Lucas Basics	Europe	48116	8/11/2019	8060	Liebher	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	48114	9/20/2019	8050	Aida GmbH	111	Smartphone case simple		80	1880
1040DE	Lucas Basics	Europe	48114	10/9/2019	8050	Aida GmbH	110	Smartphone case diamond		60	4230
1040DE	Lucas Basics	Europe	48114	10/11/2019	8050	Aida GmbH	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	48112	6/2/2019	8060	Liebher	110	Smartphone case dian		50	3520
1040DE	Lucas Basics	Europe	48112	5/30/2019	8060	Liebher	109	Laptop bag red		60	1970
1040DE	Lucas Basics	Europe	44031	6/1/2019	8050	Aida GmbH	110	Smartphone case dian		60	4230
1040DE	Lucas Basics	Europe	44031	7/10/2019	8050	Aida GmbH	109	Laptop bag red		50	1640

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