- 1. Open the Sales\_data file
- 2. Create a new file. Copy all the data from *Sales\_data* to your file. Close *Sales\_data*.
  - *Sales\_data* is locked and you won't be able to change that file.
- 3. Your goal is to a table with Salesperson as a row and Country as the column

	Region 💌					
	UK		USA		Total Orders	Total % of Orders
Salesperson 🔻	Orders	% of Orders	Orders	% of Orders		
Buchanan	\$68,792	5.6%		0.0%	\$68,792	5.6%
Callahan		0.0%	\$123,033	10.0%	\$123,033	10.0%
Davolio		0.0%	\$182,500	14.9%	\$182,500	14.9%
Dodsworth	\$75,048	6.1%		0.0%	\$75,048	6.1%
Fuller		0.0%	\$162,504	13.2%	\$162,504	13.2%
King	\$116,963	9.5%		0.0%	\$116,963	9.5%
Leverling		0.0%	\$201,196	16.4%	\$201,196	16.4%
Peacock		0.0%	\$225,764	18.4%	\$225,764	18.4%
Suyama	\$72,528	5.9%		0.0%	\$72,528	5.9%
Grand Total	\$333,331	27.1%	\$894,996	72.9%	\$1,228,327	100.0%

- 4. Click anywhere in your data
- 5. On the 'Insert' tab click the 'PivotTable' button and select 'PivotTable'.



6. The Create PivotTable dialog box will open.

Create PivotTable	<b>8</b> X						
Choose the data that yo	u want to analyze						
Select a table or ran	nge						
<u>T</u> able/Range:	Sales!\$A\$1:\$E\$800						
Use an external date	a source						
Choose Conne	Choose Connection						
Connection nam	ie:						
Choose where you want	the PivotTable report to be placed						
New Worksheet							
Existing Worksheet							
Location:							
	OK Cancel						

- 7. Tell Excel if you want your Pivot Table in a New Worksheet.
- 8. Your sheet should now look like this:

🗶   🛃 🤘	<b>୬ ୯</b> ୦ -	- 🛕 🖶	,⇒	Home	work 6-18.xls	x - Micros	oft Excel	_	PivotTab	ole Tools	
File	Home	Inse	ert Page	Layout	Formulas	Data	Review	View	Options	Design	∧ (?) — d" ×
PivotTable	Active Field V	Group	A ↓ A Z Z ↓ Sort Z ↓ Sort Sort & I	Insert Slicer *	Refresh Cha S Dat	inge Data ource * a	Clear • Select • Move Pix Action	votTable	Calculation	Tools	Field List Field List Field Headers Show
	A3		• (=	f <sub>x</sub>							~
	4	В	С	D	E	F	G		PivotTable F	Field List	<del>.</del> ×
1 2									Choose field	ls to add to i	report:
3 4 5 6 7 6 7 6 7 6 7 6 9 10 11 12 13	Piv build a lds fron Fi	report, n the Pin eld List	choose votTable						Country Salesper Order An Order D2 OrderID	son nount ate etween are Filter	as below:
15 16 17 18 19 20 21	Shoot								Row La	abels	Σ Values
Ready	2 snee	LI / Sdi	es <u>(</u> [] /							00% —	

- 9. We want the rows to be the summary by Salesperson, so drag that field to the Row.
- 10. We want the columns to be by Country, so drag Country to the Column Labels area.
- 11. We want to add up the Order Amount so drag that field to the  $\Sigma$  Values section. Excel should automatically assume "sum of"
- 12. The sheet should now look like this:

	А	В	С	D	E		PivotTable Field List 🔹 🗙
1							
2							Choose fields to add to report:
3	Sum of Order Amount	Column Labels 💌					Country
4	Row Labels 🔹	UK	USA	Grand Total			Salesperson
5	Buchanan	\$68,792		\$68,792			✓ Order Amount
6	Callahan		\$123,033	\$123,033			Order Date
7	Davolio		\$182,500	\$182,500			OrderID
8	Dodsworth	\$75,048		\$75,048			
9	Fuller		\$162,504	\$162,504			
10	King	\$116,963		\$116,963		≡	
11	Leverling		\$201,196	\$201,196			
12	Peacock		\$225,764	\$225,764			
13	Suyama	\$72,528		\$72,528			Drag fields between areas below:
14	Grand Total	\$333,331	\$894,996	\$1,228,327			Report Filter Column Labels
15							Country
16							
17							Bowlabels S. Values
18							
19							Salesperson
20							
21						Ŧ	Defer Layout Update Update
H ·	♦ ▶ ▶ Sheet1 Sales	/ 🔁 /			▶ I		

- 13.In the table change *Column Labels* to *Region*, change *Sum or Order Amount* to *Orders* and change *Row Labels* to *Salesperson*.
- 14. Change the name of the sheet to "Summary of Sales"

## Adding the %s:

- 15. Drag Order Amount and add it again to the  $\Sigma$  Values section.
- 16.Click once on the Sum of Order amount and select Value Field Settings
- 17.On the Show Values as tab, pick % of Grand Total.

Click on Number Format and reduce the decimal places to 1.

Click OK

Value Field Settings	? ×							
Source Name: Order An	nount							
Custom Name: Sum of Order Amount								
Summarize Values By Show Values As								
Show values as								
% of Grand Total								
Base field:	Base item:							
Country	A							
Order Amount								
Order Date								
OrderID								
Number Format	OK Cancel							

- 18. Change the title for those columns to "% of Orders"
- 19. Add borders as seen in the example in step 3. Fix column widths.
- 20.Set the footer to:

Name	File Name	Date
Period X	Sheet Name	

Drag fields between area	is belo	w:
Y Report Filter		Column Labels
	Cou	ntry 🔻
	Σ	Values 🔻
Row Labels	Σ	/alues
Salesperson 🔻	Orde	ers 🔻
	Sum	of Order 🔻
Defer Lavout Update		Move <u>U</u> p
		Move <u>D</u> own
■□□ 100%		Move to Beginning
		Move to <u>E</u> nd
	$\mathbf{V}$	Move to Report Filter
		Move to Row Labels
		Move to Column Labels
	Σ	Move to Values
	$\times$	Remove Field
	0,	Value Field Settings

- 21. Save the file as Homework 6-18
- 22. Print and turn in.