



Create a PivotTable

Quick Reference Guide



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PivotTables in Excel are a tool in Microsoft Excel that allow you to quickly summarise large datasets. Having the source data in the right format is a crucial step in creating a robust and error-free PivotTable. The first row should contain headers that describe the data in the columns with unique names. There shouldn't be any blank columns or cells in the source data. Don't include any totals, averages, etc., in the rows or columns.

Inserting a PivotTable in Excel

- Click anywhere in the dataset.
- Select **OK**, a new worksheet is created with the PivotTable in it.

	A	B	C	D	E	F	G	H
C7								
1	Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users
2	Halima, Yakubu	Late Jan Email	27/01/2023	Digital marketing	£500.00	£6,980.00	4205.00	465.00
3	Kovaleva, Anna	Billboards small	29/01/2023	Brand marketing	£250.00	£4,732.00	2000.00	500.00
4	Smith, Avery	Billboards large	03/02/2023	Brand marketing	£4,500.00	£5,632.00	10000.00	362.00
5	Glazkov, Ilya	Product review 3x	16/01/2023	Customer Experience	£2,750.00	£5,676.00	35000.00	5418.00
6	Lawson, Andre	Targeted - Group 1	05/03/2023	Digital marketing	£5,800.00	£136.00	10000.00	285.00
7	Cartier, Christian	Billboards small	03/01/2023	Brand marketing	£800.00	£8,703.00	2500.00	496.00
8	Barden, Malik	Industry Conference	23/02/2023	Customer Experience	£600.00	£4,540.00	950.00	618.00
9	Macedo, Beatriz	Targeted - Group 2	25/02/2023	Digital marketing	£800.00	£788.00	2000.00	367.00
10	Halima, Yakubu	Feb email - North	11/02/2023	Digital marketing	£500.00	£12,423.00	4205.00	902.00
11	Halima, Yakubu	Feb email - South	13/03/2023	Digital marketing	£500.00	£9,293.00	3687.00	673.00
12	Halima, Yakubu	Feb email - West	22/03/2023	Digital marketing	£500.00	£16,342.00	5278.00	1029.00
13	Connors, Morgan	Product mention 5x	06/02/2023	Customer Experience	£635.00	£2,208.00	55000.00	1470.00

- Go to **Insert > Recommended PivotTable**.
- Choose one of the recommended PivotTables to best summarise your data.

	A	B	C	D
C7				
1	Campaign Owner	Campaign Name	Launch Date	Campaign Type
2	Halima, Yakubu	Late Jan Email	27/01/2023	Digital marketing
3	Kovaleva, Anna	Billboards small	29/01/2023	Brand marketing
4	Smith, Avery	Billboards large	03/02/2023	Brand marketing
5	Glazkov, Ilya	Product review 3x	16/01/2023	Customer Experience
6	Lawson, Andre	Targeted - Group 1	05/03/2023	Digital marketing
7	Cartier, Christian	Billboards small	03/01/2023	Brand marketing
8	Barden, Malik	Industry Conference	23/02/2023	Customer Experience
9	Macedo, Beatriz	Targeted - Group 2	25/02/2023	Digital marketing
10	Halima, Yakubu	Feb email - North	11/02/2023	Digital marketing
11	Halima, Yakubu	Feb email - South	13/03/2023	Digital marketing
12	Halima, Yakubu	Feb email - West	22/03/2023	Digital marketing
13	Connors, Morgan	Product mention 5x	06/02/2023	Customer Experience

Recommended PivotTables

Sum of Revenue by Campaign Type

Row Labels	Sum of Revenue
Brand marketing	19067
Customer Experience	12424
Digital marketing	45962
Grand Total	77453

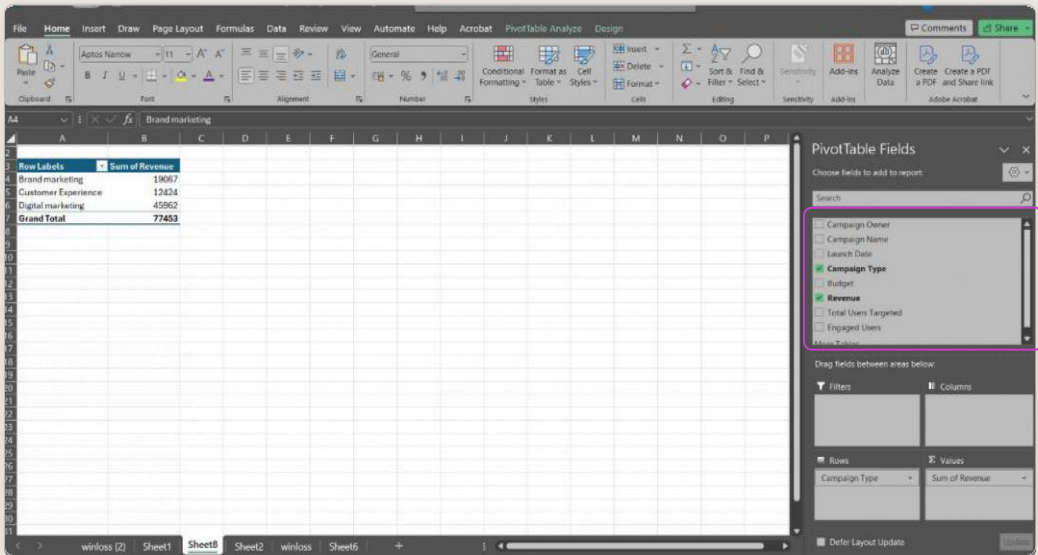
Sum of Budget by Campaign Type

Row Labels	Sum of Budget
Brand marketing	5550
Customer Experience	3985
Digital marketing	8600
Grand Total	18135

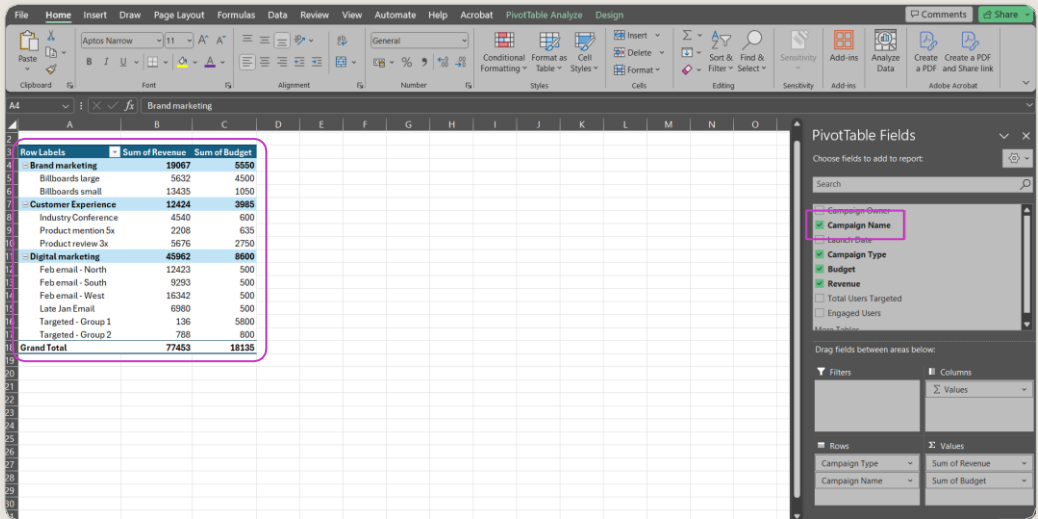
Blank PivotTable Change Source Data... OK Cancel

Managing a PivotTable in Excel

- Click anywhere in the newly created PivotTable to open the PivotTable Fields and the areas.



- The areas section is where you place the fields. It uses a simple drag-and-drop mechanism, allowing you to drag a field and drop it into one of the four areas. Once you do this, the data will instantly appear in the PivotTable on the worksheet – give it a try!



- The Fields are created based on the backend data used for the PivotTable.

- When there are changes in the existing data source and you want to refresh the PivotTable to reflect these changes, right click on any cell in the PivotTable and **Select refresh**.