



Advanced Excel Pivot Tables

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About the speaker:

David H. Ringstrom, CPA, is an author and nationally recognized instructor who teaches scores of webinars each year. His Excel courses are based on over 25 years of consulting and teaching experience. His mantra is “Either you work Excel, or it works you.” David offers spreadsheet and database consulting services nationwide.



Excel Versions

I'll be teaching from the Microsoft 365 version of Excel, and noting any differences or limitations in the legacy versions of Excel. References to Excel 2013+, Excel 2016+, and so on mean a feature is available in all subsequent versions, including Microsoft 365.

The Future of Excel

Microsoft 365 (Formerly Office 365)

Subscription-based version of Microsoft Office, which includes Excel. Use the software on multiple devices, new calculation engine, services and more features are rolling out that will dramatically set this version apart from past Excel versions.
www.microsoft365.com

Legacy Versions

Perpetual Licenses

Pay once for the software to use on a single computer. No new features added until you buy a new license. Includes

Excel 2019
Excel 2016
Excel 2013
Excel 2010
Excel 2007 and earlier

1 File Home Insert Page Layout

2 Cut Copy

Format Painter

Calibri

B I U

I demonstrate each technique at least twice, first by way of numbered steps in PowerPoint, and then in Excel.

The following articles written by David Ringstrom include PDF of today's presentation along with an example workbook that contains most examples I'll teach from as well as related articles.

Email ask@davidringstrom.com if you haven't received the handouts.

Excel Tips, Data Entry Shortcuts

Related Articles Car Payme



Summarize Access Data with Pivot Tables

1 Select cell A1 of a blank worksheet. You do not have to have Access on your computer to use this technique.

2 Choose Get Data (or From Access in older versions of Excel) from the Data menu.

3 From Database

4 From Microsoft Access Database

5 Double-click the database name to skip the Open button.

6 Choose a table or query. Screen will look different in earlier versions of Excel.

7 In most versions of Excel you can click Import instead of the arrow next to Load.

8 Load To...

9 PivotTable Report

10 OK



Automatic Pivot Table Refresh

1 PivotTable Tools - Analyze tab

2 Change Data Source button

3 Connection Properties... button

4 Query Properties dialog box, Refresh control section, ☒ Refresh data when opening the file

5 OK button

Query Properties

Query name: SalesData

Description:

Usage | Definition | Used In

Refresh control

Last Refreshed: 6/23/2017 4:04:54 PM

☐ Enable background refresh

☐ Refresh every 60 minutes

☒ Refresh data when opening the file

☐ Remove data from the external data range before saving the workbook

☒ Refresh this connection on Refresh All

☐ Enable Fast Data Load

OLAP Server Formatting

Retrieve the following formats from the server when using this connection:

☐ Number Format ☐ Fill Color

☐ Font Style ☐ Text Color

OLAP Drill Through

Maximum number of records to retrieve: []

Language

☐ Retrieve data and errors in the Office display language when available

OK Cancel

In Excel 2016 and earlier you must set this option individually for each pivot table. In Excel 2019+ you can set it automatically for all future pivot tables by choosing File, Options, Data, Edit Default Layout, Pivot Table Options, click the Data tab, and then choose Refresh Data When Opening the File and click OK.



Creating Custom Lists

Excel Options

Custom Lists

Custom Lists can contain up to 254 items.

Custom Lists

Custom lists:

NEW LIST
Sun, Mon, Tue, Wed, Thu, Fri, Sat
Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec
January, February, March, April, May, June, July, August, September, October, November, December
Oranges, Apples, Kiwi, Bananas, Mixed Berries

List entries:

Oranges
Apples
Kiwi
Bananas
Mixed Berries

Import list from cells: SD\$2:SD\$6

Advanced

Excel 2007: Choose Popular in lieu of Advanced.

Web Options...

☒ Enable multi-threaded processing

Create lists for use in sorts and fill sequences

Edit Custom Lists...

OK

Cancel

File Home Insert Page Layout

Close

Account

Feedback

Options

Manage Workbook

Product Cases Sold Total Sales

Product	Cases Sold	Total Sales
Oranges	6168	61680
Apples	6079	85106
Kiwi	6058	66638
Bananas	6868	75548
Mixed Berries	1996	29940

Fruit Sales



Custom Lists Within Pivot Tables

1 Select any cell within the data you wish to summarize.

2 Go to the Insert tab.

3 Click the PivotTable icon.

4 Click OK in the Create PivotTable dialog.

5 In the PivotTable Fields task pane, select the fields to be included.

6 The data is instead sorted in the order of the custom list.

PivotTable Fields

By default items are sorted alphabetically.

Row Labels: Apples, Bananas, Kiwi, Mixed Berries, Oranges, Grand Total

Columns: Cases Sold

Drag fields between areas below:

Row Labels	Cases Sold
Oranges	58854
Apples	48236
Kiwi	53671
Bananas	63093
Mixed Berries	43733
Grand Total	267587



Disabling Custom List Sorting

1 Right-click any cell.

2 Field Settings...
PivotTable Options...

3 Click OK.

4 Use Custom Lists when sorting

5

6 Right-click any Row Label column item.

7 Sort

8 Sort A to Z

9 The data now appears in alphabetical order once again.

Pivot tables only sort one field at a time, so be sure to carry out one sort per Row Field present on your pivot table.

Row Labels	Sum of Cases Sold
Apples	48236
Bananas	63093
Kiwi	53671
Mixed Berries	43733
Oranges	58854
Grand Total	267587



Autofit Column Widths

Panel 1: Initial State

Row Labels	Sum of Cases Sold
Middle Georgia Fruit	15538
Whistlestop Fruit Stand	40550
Grand Total	56088

Region: Mid GA, North GA, South GA

1. Presently column A is 21 points wide. A point is approximately 1/16"

Panel 2: Resized State

Row Labels	Sum of Cases Sold
Bob's Fruit	38185
Fruit Direct	25322
Fruit R Us	27169
Fruitju	27487
Mountain Fruit	29015
Orange U Glad	26111
Grand Total	173289

Region: Mid GA, North GA, South GA

2. Column A is now 14 points wide. By default pivot table columns resize automatically.

Panel 3: PivotTable Options

PivotTable Name: PivotTable3

6. Layout & Format | Totals & Filters | Display | Print

Layout

☐ Merge and center cells with labels

When in compact form indent labels: 1

7. Autofit column widths on update

8. Click OK.



Pivot Table Slicers (Excel 2010+)

1 Select any cell within a pivot table.

2 PivotTable Analyze

3 Insert Slicer

4 Insert Slicers

5 OK

6 Bananas

7 The pivot table now shows sales for a single product.

Row Labels	Sum of Total Sales
Mid GA	
North GA	
South GA	
Grand Total	756649

Slicers are not available in Excel 2007.



Slicing Multiple Pivot Tables

1 Create at least two pivot tables from the same data source.

2 Right-click the Slicer.

3 Excel 2010: Choose PivotTable Connections.

4 Select additional pivot table(s).

5 OK

6 Both pivot tables update when you make a choice from the slicer.

Row Labels	Sum of Cases Sold
Apples	1565
Bananas	9842
Grand Total	38185

Row Labels	Sum of Cases Sold
Atlanta	118952
Blue Ridge	20015
Brunswick	
Clarkesville	
Macon	

Row Labels	Sum of Cases Sold
Apples	1565
Bananas	9842
Kiwi	9967
Mixed Berries	8993
Oranges	7818
Grand Total	25322

Row Labels	Sum of Cases Sold
Clarkesville	25322
Grand Total	25322

Report Connections (Vendor)

Select PivotTable and PivotChart reports to connect to this filter

Name	Sheet
☒ PivotTable3	Sheet2
☒ PivotTable4	Sheet2

Vendor

- Bob's Fruit
- Fruit Direct**
- Fruit R Us
- Middle Georgia Fruit
- Mountain Fruit



Timeline Feature (Excel 2013+)

Step 1: Select any cell within a pivot table that contains at least one column of dates in its source data.

Step 2: Choose the Timeline command from the Insert or Analyze menus.

Step 3: Select a column, only columns containing dates will appear here.

Step 4: Click OK.

Step 5: The Timeline appears.

Step 6: Select a month.

Step 7: The pivot table only shows data for that month.

Step 8: Click Clear to show all data again.

Step 9: Click here to change the time scale.

Step 10: Right-click on a Timeline and choose Remove if you wish to delete the object.

The screenshots show the following data in the pivot table:

Row Labels	Sum of Cases Sold
Apples	489190
Bananas	
Kiwifruit	
Mixed Fruit	
Oranges	
Grand Total	2644309

When filtered for January 2018, the data is as follows:

Row Labels	Sum of Cases Sold
Oranges	46062
Grand Total	236026



Pivot Table Conflicts

	A	B	C
1	Product	Total Sales	
2	Bananas	756,649	
3	Grand Total	756,649	
4			
5	Top 5 Vendors	Total Sales	
6	Bob's Fruit	403,746	
7	Fruitju	372,053	
8	Mountain Fruit	383,506	
9	Orange U Glad	321,368	
10	Whistlestop Fruit Stand	495,770	
11	Grand Total	1,976,443	

1

Product

Apples Bananas Kiwi

Mixed B... Oranges

	A	B	C	D	E	F	G
1	Product	Total Sales					
2	Bananas	756,649					
3	Grand Total	756,649					
4							
5	Top 5 Vendors	Total Sales					
6	Bob's Fruit	403,746					
7	Fruit Direct	372,053					
8	Fruitju	126,630					
9	Orange U Glad	81,521					
10	Whistlestop Fruit Stand	87,934					

2

Product

Apples Bananas Kiwi

Mixed B... Oranges

	A	B	C	D	E	F	G
1	Product	Total Sales					
2	Bananas	756,649					
3	Grand Total	756,649					
4							
5	Top 5 Vendors	Total Sales					
6	Bob's Fruit	98,420					
7	Fruit Direct	107,406					
8	Fruitju	126,630					
9	Orange U Glad	81,521					
10	Whistlestop Fruit Stand	87,934					

3

Product

Apples Bananas Kiwi

Mixed B... Oranges



3 A conflict has arisen because two pivot tables are too close in proximity to each other. The product pivot table cannot expand to show all products.



Pasting Linked Pictures of Pivot Tables

Step 1: Select cells A1:B10 of the Region worksheet and then right-click and choose Copy.

Region	Total Sales
Mid GA	102,664
North GA	550,425
South GA	103,560
Grand Total	756,649

Step 2: Select cell A1 of the Dashboard worksheet.

Step 3: Home

Step 4: Paste

Excel 2007:
Choose As Picture, and then Paste Picture Link.

Excel for Mac:
Choose Linked Picture.

Step 5: Other Paste Options

Step 6: Copied cells are pasted as a linked picture.

Region	Total Sales
Mid GA	102,664
North GA	550,425
South GA	103,560
Grand Total	756,649



Another Pivot Table XLS Limitation

The screenshot illustrates a PivotTable setup in Microsoft Excel with the following components and annotations:

- PivotTable Fields Task Pane:** Located on the right, it shows a list of fields: Type, Date, Number, Vendor, Account, and Amount. The **Date** field is circled in red, and a red arrow points from it to the **Columns** section of the task pane.
- PivotTable Layout:** The layout is divided into four sections:
 - Drop Report Filter Fields Here:** Located at the top.
 - Drop Column Fields Here:** Located on the right.
 - Drop Row Fields Here:** Located on the left.
 - Drop Value Fields Here:** Located in the center.
- Annotation 1:** A yellow callout bubble with the text "Drag Date into the Columns section." points to the **Date** field in the task pane.
- Annotation 2:** A yellow callout bubble with the text "The date field contains 338 unique dates, which exceeds the available columns within an Excel 97-2003 workbook." points to the **Columns** section of the task pane.
- Warning Message:** A yellow warning icon is displayed with the text: "The field you are dropping into the column area exceeds 256 items. Only the first 256 items will be displayed as columns. To include all of the field's data in your PivotTable report, drop the field into a different area, such as the data area." Below the message are two buttons: **Continue Drop** and **Cancel**. The **Cancel** button is circled in red.
- Annotation 3:** A yellow callout bubble with the text "Copy and paste the Transaction data into a new workbook and then create your pivot table to resolve this issue." points to the **Cancel** button.
- Annotation 4:** A yellow callout bubble with the text "Copy and paste the Transaction data into a new workbook and then create your pivot table to resolve this issue." points to the **Cancel** button.



Convert XLS Workbooks

1. Click the **File** tab in the ribbon.

2. Click **Info** in the left sidebar.

3. Click the **Convert** button in the left sidebar.

4. In the **Microsoft Excel** dialog box, check **Do not ask me again about converting workbooks.**

5. Click **OK** in the **Microsoft Excel** dialog box.

6. Click **Yes** in the **Microsoft Excel** dialog box.

Info

The Convert command only appears when Compatibility Mode appears at the top of the screen.

C:\Users\HP\Dropbox\Excel Training\Examples

Compatibility Mode

Some new features are disabled to prevent problems when working with previous versions of Office. Converting this file will enable these features, but may result in layout changes.

Properties

Size	41.0KB
Title	Add a title
Tags	Add a tag

Microsoft Excel

This action converts the workbook to the current file format, which allows you to use all of the new features of Excel, and it reduces the file size. The original workbook will be deleted and cannot be restored after this conversion.

☒ Do not ask me again about converting workbooks.

Tell Me More...

Microsoft Excel

The workbook conversion to the current file format completed successfully. To use the new and enhanced features of the current file format, you must close and reopen the workbook. Do you want to close and reopen the workbook now?



Resolving Pivot Table Duplicate Values

Panel 1: Source Data

Account	Amount
3000	110
2000	435
4000	381
4000	358
5000	112
2000	495

Click any cell within the list.

Panel 2: PivotTable Fields

Choose fields to add to report:

Search

☒ Account

☒ Amount

More Tables...

Drag fields between areas below:

Filters

Columns

Rows: Account

Values: Sum of Amount

☐ Defer Layout Update

Update

Panel 3: PivotTable Result

Row Labels	Sum of Amount
2000	930
3000	110
4000	534
5000	739
4000	843
Grand Total	3156

Account 4000 appears twice due to a nuance in our data.



Resolving Pivot Table Duplicate Values

8 Select the column that contains numbers stored as text.

A	B	C
Account	Amount	
3000	110	
4000	381	
4000	358	
5000	112	
2000	495	
4000	153	
5000	328	

9 Data

10 Text to Columns

Convert Text to Columns Wizard

The Text Wizard has 3 steps. If this is correct, choose the file type that describes your data.

Original data type: Delimited

Choose the file type: Delimited (selected), Fixed width

Preview of selected data:

1	Account
2	3000
3	4000
4	5000
5	2000

11 Finish

12 Right-click any cell within the pivot table.

13 Refresh

14 Account 4000 only appears once.

A	B	C
Row Labels	Sum of Amount	
2000	930	
3000	110	
4000	1377	
5000	739	
Grand Total		



Presenting Pivot Table Data in Columns

1 Excel's default of Compact Form for pivot tables sometimes results in staggered and duplicate data.

2 Choose Report Layout from the Design menu.

3 Show in Tabular Form

4 The staggering is resolved, but duplication remains.

Row Labels	Sum of Sales
1546	
Company 1546	
Contact 1546	
800-555-1546	15460
Contact 1546 Total	15460
Company 1546 Total	15460
1546 Total	15460
1867	
Company 1867	
Contact 1867	
800-555-1867	18670
Contact 1867 Total	18670
Company 1867 Total	18670
1867 Total	18670
2003	
Company 2003	
Contact 2003	
800-555-2003	20030
Contact 2003 Total	20030



Presenting Pivot Table Data in Columns

5 Choose Subtotals on the Design menu.

6 Do Not Show Subtotals

Customer #	Company Name	Contact Name	Contact Phone #	Sum of Sales
1546	Company 1546	Contact 1546	800-555-1546	15460
1867	Company 1867	Contact 1867	800-555-1867	18670
2003	Company 2003	Contact 2003	800-555-2003	20030
2505	Company 2505	Contact 2505	800-555-2505	25050
4523	Company 4523	Contact 4523	800-555-4523	45230
4731	Company 4731	Contact 4731	800-555-4731	47310
4820	Company 4820	Contact 4820	800-555-4820	48200
4854	Company 4854	Contact 4854	800-555-4854	48540
4975	Company 4975	Contact 4975	800-555-4975	49750
5303	Company 5303	Contact 5303	800-555-5303	53030
5442	Company 5442	Contact 5442	800-555-5442	54420
5910	Company 5910	Contact 5910	800-555-5910	59100
7180	Company 7180	Contact 7180	800-555-7180	71800
7867	Company 7867	Contact 7867	800-555-7867	78670
8456	Company 8456	Contact 8456	800-555-8456	84560
Grand Total				719820

7 The data is flattened, with one row per record and no duplications.



Blank Cell within Data

1 Type N/A in cell J2. In most versions of Excel a blank cell will cause the same behavior that a single cell containing text causes.

2 Right-click.

3 Refresh

4 Click the checkbox for Total Sales. In most versions of Excel will appear in Rows. Drag if there if it appears in Values.

5 Drag Total Sales into the Values section. If the records show a Sum instead of a Count, click Count of Total Sales, choose Field Settings, and then double-click Count.

6 Right-click any count.

7 Summarize Values By

8 Sum

Product	Cases Sold	Total Sales
Oranges	6168	N/A
Apples	6079	85106
Kiwi	9967	99670
Bananas	9842	98420

Row Labels	Sum of Cases	Count of Total Sales
Mid GA	56088	10
North GA	173289	30
South GA	38210	10
Grand Total		50



Filling Blank Cells with Zeros for Pivot Tables

1 Select a range that includes blank cells.

2 Choose Find & Select on Excel's Home Menu.

3 Go To Special...

4 Double-click Blanks to skip the OK button.

5 Type 0 (zero) and then press Ctrl-Enter.

6 All previously blank cells contain zeros.

Account	Debit	Credit
10100 · Checking	55,641.39	
10300 · Pet		
10400 · Per		
11000 · Accounts Receivable	43,410.19	
12000 · Undeposited Funds	500.00	
12100 · Inventory Asset	83,547.91	
12800 · Employee Advances	0.00	
13100 · Pre-paid Insurance	27,872.63	
13400 · Retainage Receivable	0.00	
15000 · Furniture and Equipment	770.00	
15100 · Vehicles	0.00	
15200 · Buildings and Improvements	5,418.02	
15300 · Construction Equipment	34,326.00	
16900 · Land	78,936.91	
17000 · Accumulated Depreciation	325,000.00	110,344.60
18700 · Security Deposits	15,300.00	1,720.00
20000 · Accounts Payable	90,000.00	58,345.02
20500 · QuickBooks Credit Card		25.00
20600 · CalOil Credit Card		436.80
24000 · Payroll Liabilities		841.00
24000 · Payroll Liabilities		1,293.79



Create a Pivot Table Clean-Up Macro

The image illustrates the steps to create a Pivot Table Clean-Up Macro in Excel, numbered 1 through 13:

1. Click the **View** tab on the ribbon.
2. Click the **Macros** button in the View tab group.
3. Click **Record Macro...** in the Macros dropdown menu.
4. In the **Record Macro** dialog box, enter the macro name: **PivotTableCleanUp**.
5. In the **Store macro in:** dropdown, select **Personal Macro Workbook**.
6. In the **Description:** text box, enter: **Removes "Sum Of" field prefixes, changes fields from counting to sum, and establishes automatic number formatting**.
7. Click the **OK** button.
8. Click the **View** tab on the ribbon.
9. Click the **Macros** button in the View tab group.
10. Click **Stop Recording** in the Macros dropdown menu.
11. Click the **View** tab on the ribbon.
12. Click the **Unhide** button in the View tab group.
13. In the **Unhide** dialog box, click **OK**.



Create a Pivot Table Clean-Up Macro

The image is a composite of three screenshots from Microsoft Excel, illustrating the steps to create and run a Pivot Table Clean-Up Macro.

- Step 14:** The **View** tab is selected in the Excel ribbon.
- Step 15:** The **Macros** button in the View tab is clicked.
- Step 16:** The **Macro** dialog box is open. The **Macro name:** field contains **PivotTableCleanUp**. The **Macros in:** dropdown is set to **personal.xlsb**. The **Edit** button is highlighted.
- Step 17:** The **Edit** button is clicked.
- Step 18:** The **Microsoft Visual Basic for Applications - personal** window is open. The **Sub PivotTableNumberFormat ()** procedure is visible. A yellow callout box states: "The Visual Basic Editor appears onscreen."
- Step 19:** The **View** tab is selected in the Excel ribbon.
- Step 20:** The **Hide** button in the View tab is clicked. A yellow callout box states: "Hide the personal.xlsb workbook."



Pivot Table Clean-Up Macro Programming Code

The image shows a two-part process for creating a macro in Excel. The left part shows a web browser with a URL circled in red (21) and a code snippet highlighted in blue (23). The right part shows the Visual Basic editor with a menu path circled in red (25, 26, 27) and the code being pasted into a module (24).

Step 21: The URL <https://www.davidringstrom.com/pivottablecleanup/> is circled in red.

Step 22: The text "Press CTRL+C to Copy, CTRL+V to Paste" is circled in red.

Step 23: The code snippet is highlighted in blue:

```
For Each Rng In Selection
    Rng.PivotField.Function = xlSum
    Rng.PivotField.NumberFormat = "#,##0-##0"
```

Step 24: The code is pasted into the Visual Basic editor, just below the green apostrophe below the comment. The code is:

```
Sub PivotTableCleanUp()
    ' PivotTable Removes "
    On Error Resume Next

    For Each Rng In Selection
        Rng.PivotField.Function = xlSum
```

Step 25: The menu path File > Save As is circled in red.

Step 26: The option Save personal.xlsb is circled in red.

Step 27: The option Close and Return to Microsoft Excel is circled in red.



Testing the Pivot Table Clean-Up Macro

28 Select a cell from each column that contains numbers.

Row Label	Sum of Cases	So Count of Total
Mid GA	56088	10
North GA	173289	30
South GA	38210	10
Grand Total	267587	50

31 Double-click PivotTableCleanUp to skip the Run button.

Macro name: personal.xlsb!PivotTableCleanUp

Run Step Into Edit Create Delete Options...

29 View

30 Macros

32

- Sum of/Count of prefixes removed
- Numbers formatted with commas
- Any Count fields now Sum instead

Row Labels	Cases Sold	Total Sales
Mid GA	56,088	691,787
North GA	173,289	2,108,437
South GA	38,210	449,414
Grand Total	267,587	3,249,638



Grouping Transactions By Month/Quarter/Year

1

Right-click on a date.

2

Group...

3

Select Months and Years.

4

OK

5

The Pivot Table is now grouped by Years and Months.

	A	B	C	D	E	F	G
1							
2							
3	Sum of Amount	Column Labels					
4	Row Labels	2017	2018				
5		Nov	Dec	Jan	Feb	Mar	Apr
6	Bill	-20554	-3295.53	-1246.97	-532.97	-1245.5	
7	Bill Pmt - Check		-16364.53	-2582.97	-967.97	-1959.5	
8	Check	-1200	-2332.59	-30425.02	-7624.16	-13113.1	-10789.8
9	Credit						
10	Credit Card Charge			4050.98	-1600		-140
11	General Journal						
12	Item Receipt						
13	Liability Check						
14	Purchase Order	-2050					
15	Sales Tax Payment			-3146.88	-1466.32	-83.6	
16	Grand Total	-3250	-18386.59	-57282.94	-14520.42	-14697.64	-15394.8
17							
18							
19							
20							
21							
22							



Subtotal by Year

A			B							
4	Sum of Amount	Years								
5										
6	Type									
7	1									
8	2									
9										
10	Credit									
11	Credit Card Char									
12	General Journ									
13	Item Receipt									
14	Liability Check									
15	Purchase Order									
16	Sales Tax Payme									
17	Grand Total									
18										
19										
20										
21										
22										
23										
24										
25										

A			B							
4	Sum of Amount	Years								
5										
6	Type									
7	Bill	20119	20119	3730.53	532.97	1246.97	1245.53	532.97		
8	Bill Pmt - Check			16364.53	2582.97	967.97	1959.53	532.97		
9	Check	3532.59	3532.59	30425.02	7624.16	13113.1	3289.83	13168.16		
10	Credit									
11	Credit Card Charge								1400	
12	General Journal	4500								
13	Item Receipt									
14	Liability Check									
15	Purchase Order	2050	2050							
16	Sales Tax Payment			3146.88	1466.32	83.6		318.02		
17	Grand Total	30201.59	30201.59	57717.94	13806.42	15411.64	7894.89	14552.12		
18										
19										
20										
21										
22										
23										
24										
25										



Group Pivot Table Columns by Fiscal Year

1 Add a column to your source data that presents the dates in yyyy-mm-dd format.

2 Drag the new field into the Columns section of your pivot table. Use Change Data Source to include the new column if needed.

3 Select the dates in the fiscal period, such as cells B4:M4, and then right-click.

4 Expand/Collapse

5 Replace Group1 with your wording of choice.

6 Expand or collapse the group as needed, and group additional fiscal periods in the same fashion.

Column Labels	2018-11-28	2018-11-30	2018-12-01	2018-12-02	2018-12-03	2018-12-04	2018-12-05	2018-12-06	2018-12-07	2018-12-08	2018-12-09	2018-12-10	2018-12-11	2018-12-12	2018-12-13	2018-12-14	2018-12-15	2018-12-16	2018-12-17	2018-12-18	2018-12-19	2018-12-20	2018-12-21	2018-12-22	2018-12-23	2018-12-24	2018-12-25	2018-12-26	2018-12-27	2018-12-28	2018-12-29	2018-12-30	2018-12-31
2018-11-28																																	
2018-11-30																																	
2018-12-01																																	
2018-12-02																																	
2018-12-03																																	
2018-12-04																																	
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Thank you for attending!

I'm happy to hear from you. In particular let me know if you did not receive the handouts for this presentation.

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Is there something you were hoping to learn today but didn't?
Please let me know. You can ask me anything about Excel.