Lesson 5-17: Add a calculated field to a pivot table

1. Open Transactions-13 from your sample files folder (if it isn’t already open).

2. Remove the Average of Total2 and Max of Total3 Fields.

You learned how to do this in: Lesson 5-3: Understand pivot table rows and columns.

3. Format the Sum of Total field to show a comma thousand separator.

   1. Right-click any of the values in column B within the pivot table.
   2. Click Number Format… on the shortcut menu.
   3. Click the Number category.
   4. Check the Use 1000 Separator (,) check box.
   5. Click OK.

4. Add a calculated field called Bonus that will calculate 3% of total sales.

   1. Click: PivotTable Tools ➔ Analyze ➔ Calculations ➔ Fields, Items & Sets ➔ Calculated Field…

      The Insert Calculated Field dialog appears.

   2. Type Bonus into the Name text box.

   3. Click in the Formula text box and remove the zero, leaving only an = sign.

   4. Select Total in the Fields list and then click the Insert Field button.

   5. The word Total is added to the Formula.

   6. Type *3% to complete the formula.
7. Click the OK button.

A new field called Bonus has now appeared in the PivotTable Field List and a Sum of Bonus field has appeared in column C.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
</tr>
<tr>
<td>4</td>
<td>Employee</td>
<td>Sum of Bonus</td>
</tr>
<tr>
<td>5</td>
<td>Armstrong, Dan</td>
<td>7,880.51</td>
</tr>
<tr>
<td>6</td>
<td>Spears, Julie</td>
<td>10,683.14</td>
</tr>
<tr>
<td>7</td>
<td>West, Chuck</td>
<td>6,847.74</td>
</tr>
<tr>
<td>8</td>
<td>Grand Total</td>
<td>25,411.39</td>
</tr>
</tbody>
</table>

5. Change the names at the top of columns B and C to Sales and Bonus Due.
   1. Click cell B4.
   2. Type the new name Sales.
   3. Press the <Tab> key to save the value and move to cell C4.
   4. Type: Bonus Due into cell C4.

6. Remove the Field Header (this is currently shown in row 4).

The pivot table looks untidy because cell A4 includes a filter button. If you wanted to print the pivot table you would also want to remove the filter button.

Click: PivotTable Tools→Analyze→Show→Field Headers.

The three items in the Show group are toggle buttons which allow you to add and remove different pivot table artefacts.

The pivot table is now well formatted.

7. Save your work as Transactions-14.