PacificCPE

COURSE
60502A

Advanced Excel - Pivot Table Calculations, Sorting, and Filtering

Once you have a pivot table built, the real power comes from customizing it. This course explores how to add calculated fields and items, work with different summary functions, and control exactly what data appears through sorting and filtering tools. Whether you're analyzing client revenue, expense trends, or tax data across multiple categories, these skills let you slice through large datasets and surface the numbers that actually matter to your work.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recall the characteristics of various Excel calculations.
- Recall the various wildcards used in the Values Filters menu.

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Publication Date: July 2026

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Chapter 1: USING CALCULATIONS IN PIVOT TABLES

Chapter Objective

After completing this chapter, you should be able to:

- Recall the characteristics of various Excel calculations.

In Chapter 2 of course 60501A, "Summarizing and Presenting Data with a Pivot Table," the pivot table you built displays either a sum or a count for the field you have in the Values section of the PivotTable Fields window. If the field being used in the Values section of the PivotTable Fields window contains any text or date values in the column from the original data, the calculation will default to a count. If the field being used in the Values section of the PivotTable Fields window contains all numbers in the column from the original data, the calculation will default to a sum.

You can see the calculation that is used by looking at the Values section of the PivotTable Fields window or by looking at the top-left corner of the pivot table.

Of course, as you will learn in this chapter, you can add more calculations to the pivot table or change the calculations that are already there.

USING BUILT-IN CALCULATIONS IN YOUR PIVOT TABLE

It is time to explore the many other calculations that are available in pivot tables. These calculations allow you to summarize and analyze your data in many ways. There are numerous calculations that are built in, and there are calculations that you can create. Let's start with the calculations that are already part of the pivot table.

Adding Calculation Fields to the Pivot Table

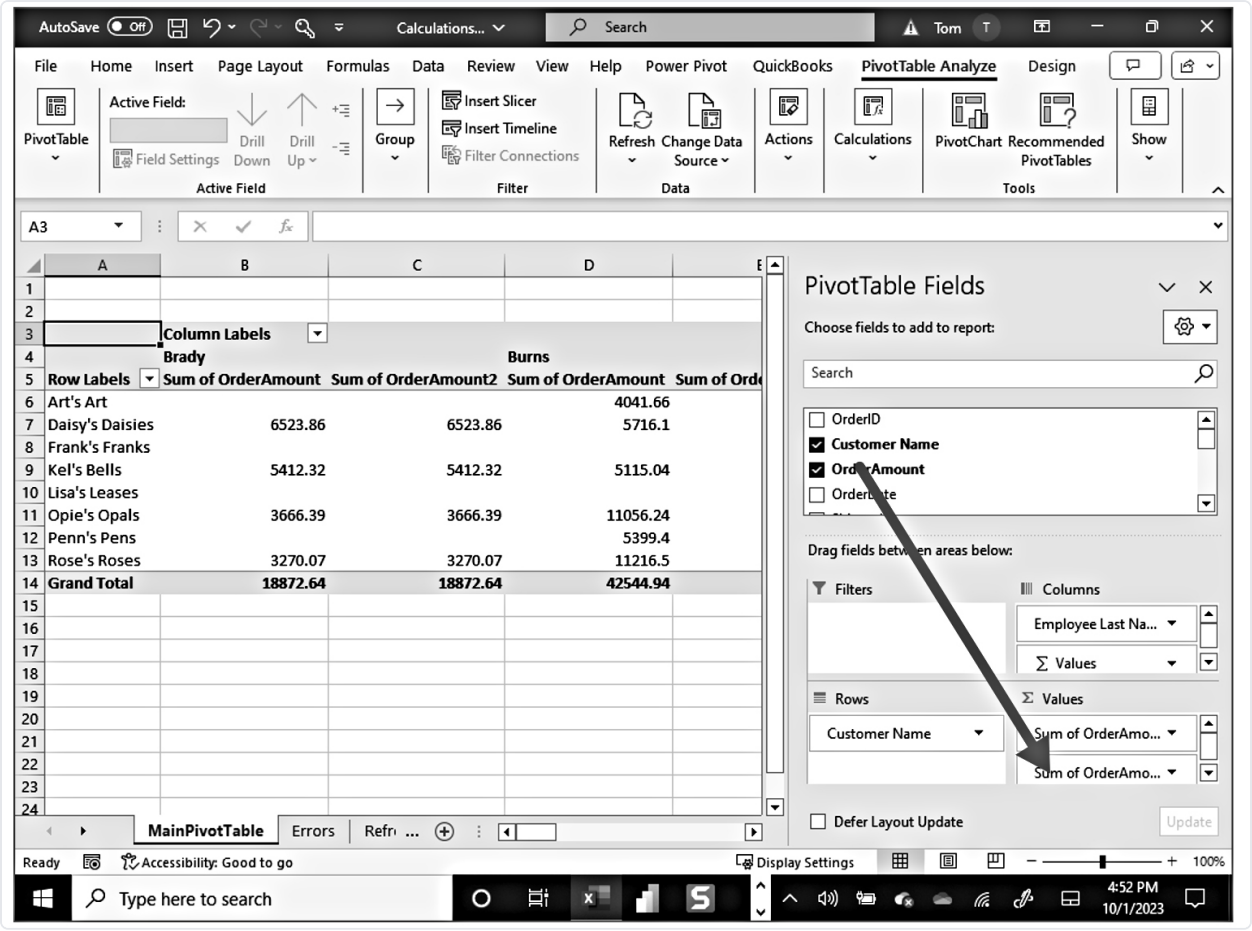
As you continue to use pivot tables, there will be many times when you want the pivot table to display multiple calculations at the same time. For example, you might want to display both the sum and the count of a field. The pivot table can display as many calculations as you want.

To add additional calculations to the pivot table, you can do the following:

1. Click the pivot table.
2. Drag another field from the list of fields to the Values section of the PivotTable Fields window. You can either use the same field that you used before or use a different field. If you are using the sample data, drag the OrderAmount field to the Values section.

You will now see the additional column in the pivot table, as shown in Figure 3.1.

FIGURE 3.1: ADDING ANOTHER CALCULATION TO A PIVOT TABLE

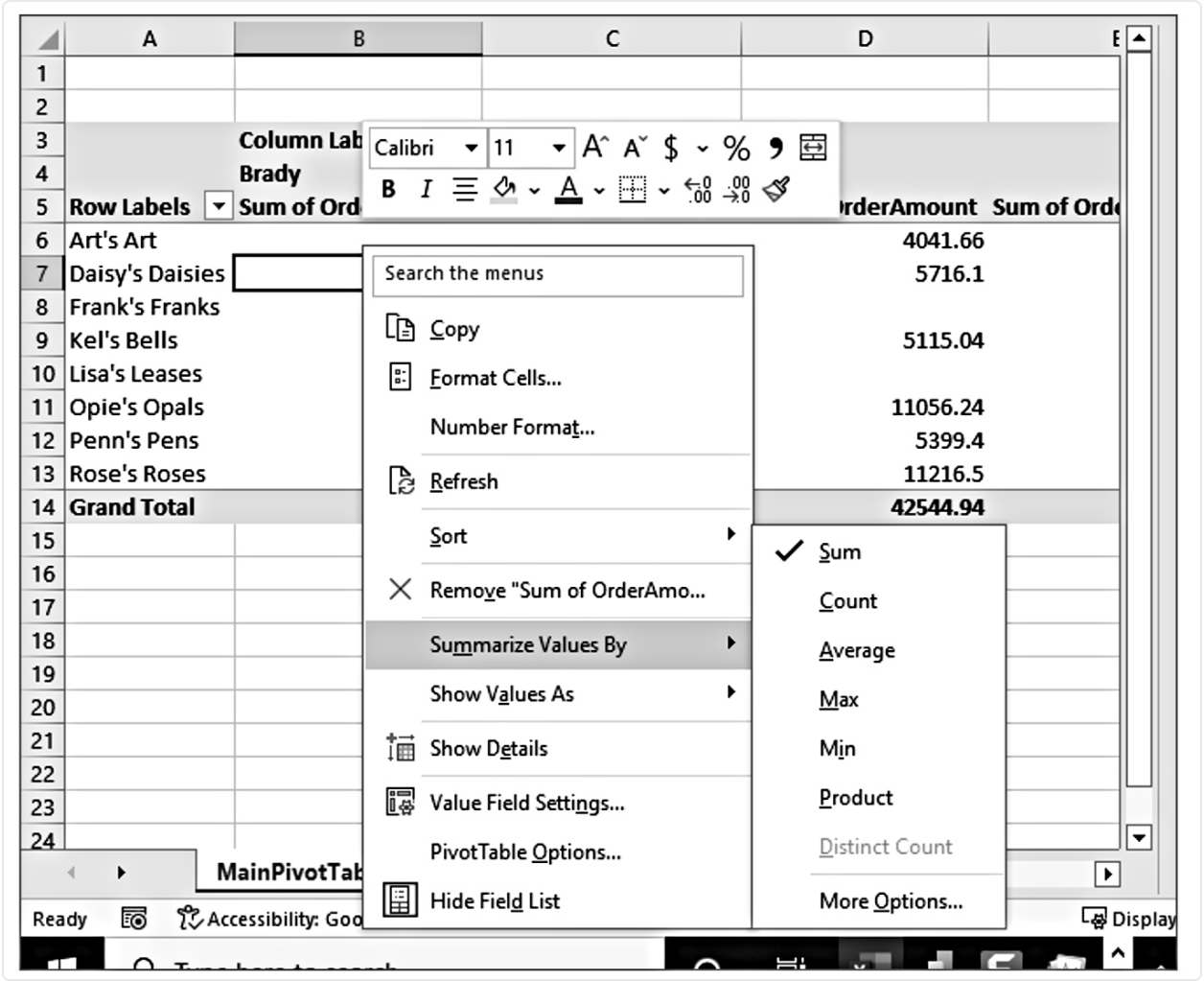


You may notice that the pivot table is displaying two sums or two counts. If you used the same field in the Values section of the PivotTable Fields window that you used previously, the pivot table could now be displaying duplicate data. Of course, you want to change the calculation type of one of those fields, maybe from a sum to a count or from a count to a sum. Excel provides several ways to easily change the calculation type of a field.

Changing the Calculation Type of a Field

A quick way to change the calculation type of a number in the pivot table is to right-click a number in the pivot table and then click Summarize Values By, as shown in Figure 3.2. In the resulting menu, click the type of calculation you want to use.

FIGURE 3.2: CHANGING A NUMBER'S CALCULATION BY RIGHT-CLICKING A NUMBER IN THE PIVOT TABLE



There is a different way to change the type of calculation, which I prefer. The Value Field Settings dialog box gives you more types of calculations and more flexibility when managing a calculation in the pivot table.

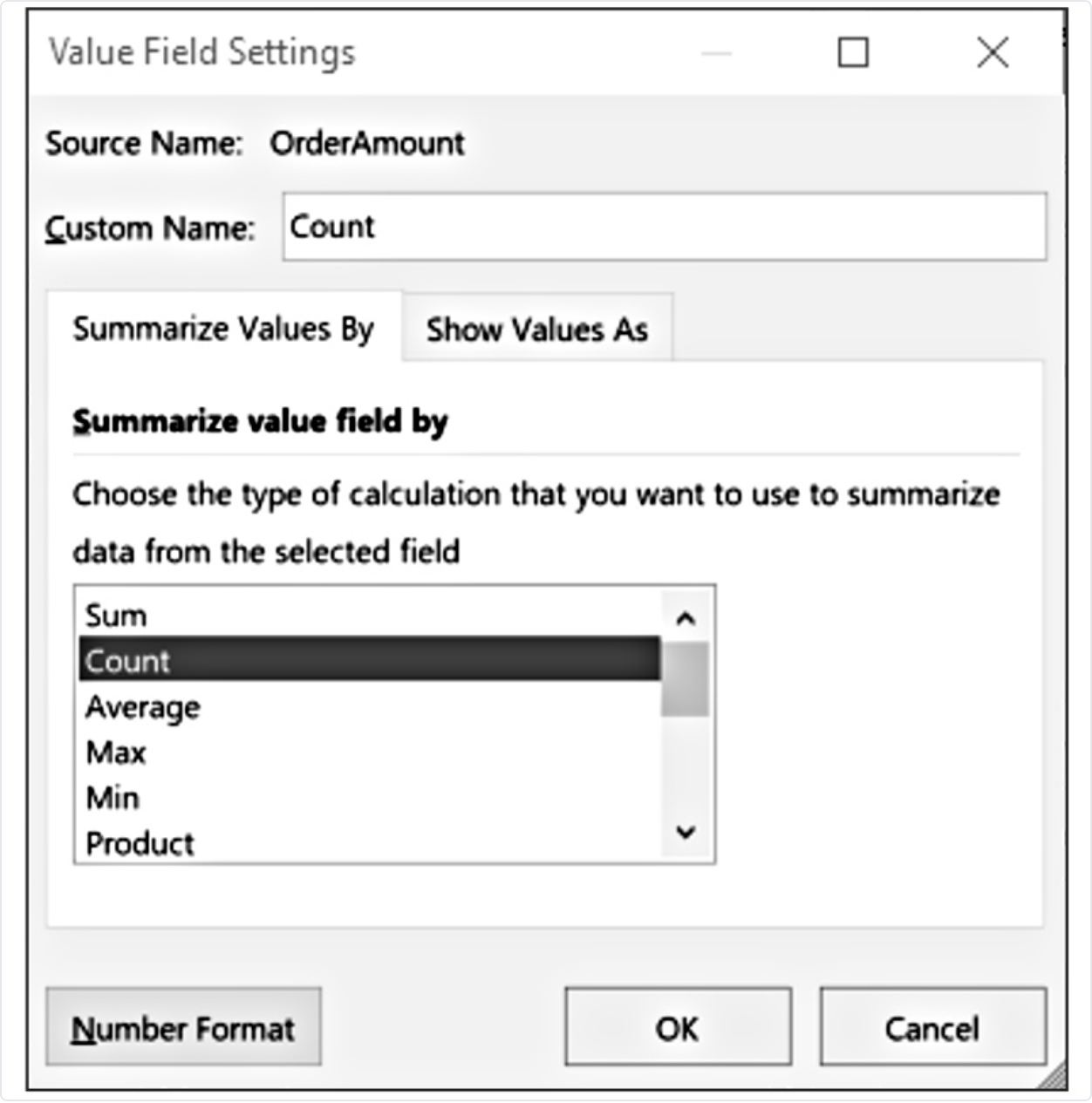
The Value Field Settings dialog box also allows you to change the name of the field and the number format of the field.

The following steps show you how to change a sum calculation to a count using the Value Field Settings dialog box.

1. Click the field you want to change in the Values section of the PivotTable Fields window. If you are using the sample data, click the second OrderAmount field you see in the Values section.

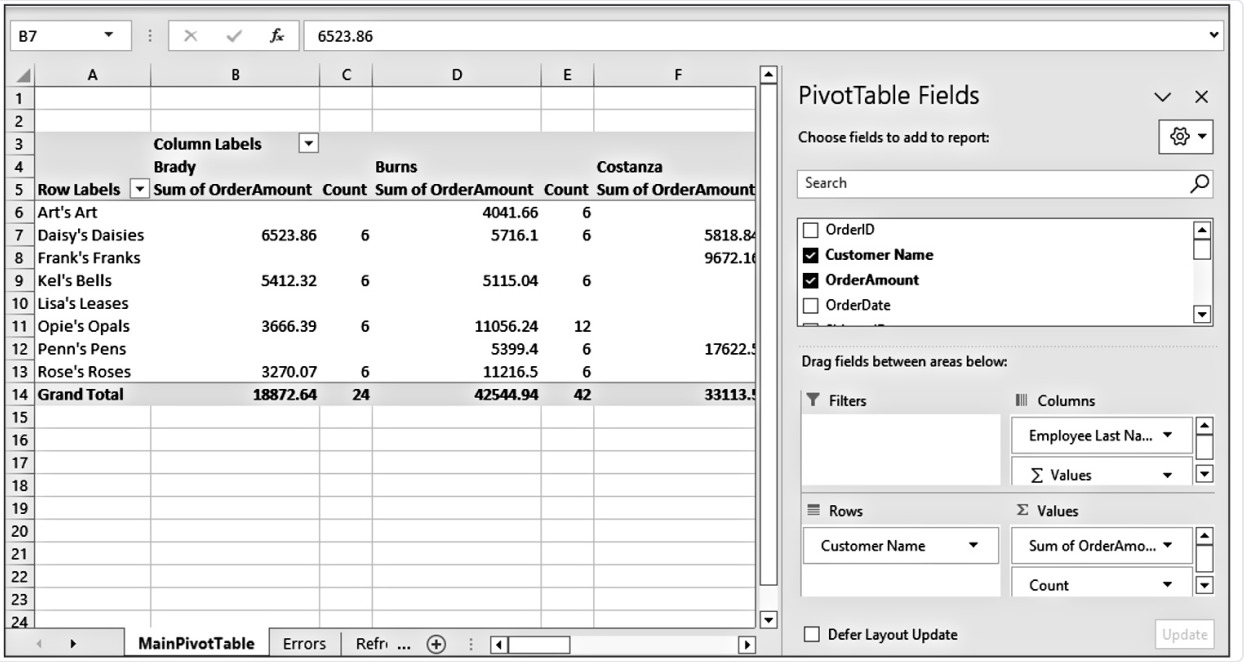
2. Click Value Field Settings, which will appear right above the field name. You will now see the Value Field Settings dialog box, as shown in Figure 3.3.
3. Click the Summarize Values By tab.
4. Choose the calculation you want. For this example, I will choose Count.
5. Click the space to the right of Custom Name and type Count. Whatever you type into the Custom Name box will show up as the column header for the field in the pivot table and also in the Values section of the PivotTable Fields window.
6. Click OK to save your changes.

FIGURE 3.3: THE VALUE FIELD SETTINGS DIALOG BOX



You will now see the new results in the pivot table for the field that you changed, as shown in Figure 3.4.

FIGURE 3.4: PIVOT TABLE WITH A SUM AND A COUNT



	A	B	C	D	E	F
3		Column Labels				
4		Brady		Burns		Costanza
5	Row Labels	Sum of OrderAmount	Count	Sum of OrderAmount	Count	Sum of OrderAmount
6	Art's Art			4041.66	6	
7	Daisy's Daisies	6523.86	6	5716.1	6	5818.84
8	Frank's Franks					9672.16
9	Kel's Bells	5412.32	6	5115.04	6	
10	Lisa's Leases					
11	Opie's Opals	3666.39	6	11056.24	12	
12	Penn's Pens			5399.4	6	17622.5
13	Rose's Roses	3270.07	6	11216.5	6	
14	Grand Total	18872.64	24	42544.94	42	33113.5

> ***Note***
>
> If you get a message that states "Averages, standard deviations, and variances are not supported when a PivotTable report has calculated items," it is because your pivot table already contains at least one calculated item, which will be covered later in this chapter.

Although it is better to use a number field in the Values section of the PivotTable Fields window, a number field is not required. All the available calculations from the Value Field Settings window will work with a number field.

A text field, on the other hand, will display meaningful results only if you use the count calculation. Some of the numeric calculations, like average, will give you an error if you try to use them with a text field.

Similarly, only the count, min, and max calculations will give you any meaningful results with a date field. When the min or max calculations are used with a date field, the pivot table will display either the earliest date or the most recent date in the pivot table. The value displayed in the pivot table for the min or max date will probably be displayed in numeric format, so you will likely need to reformat the column as a date field.

Changing the Order of the Calculations

Just like in the Rows section or the Columns section of the PivotTable Fields window, the order of the fields matters in the Values section.

The pivot table will display the fields going across left to right based on the top-down order in the Values section.

You can have as many fields in the Values section as you need. To change the order of the fields within the Values section, simply drag each field above or below the other fields. The pivot table will immediately display the new results.

The Calculations in the Summarize Values By Tab

The calculations that are available in the Summarize Values By tab of the Value Field Settings dialog box are all mathematical summaries of a particular data point, which is the intersection of a row and column in the pivot table that is based on the original list of data. For example, if the row header of the pivot table shows “Art’s Art” and the column header of the pivot table shows “Brady,” then the number shown in the cell that intersects the row and column would be the summary of the records from the original data that have “Art’s Art” in the Customer Name column and “Brady” in the Employee Last Name column. All the calculations in the Summarize Values By tab of the Value Field Settings dialog box can be added to the pivot table the same way as the Count. Table 3.1 shows the calculations that are available in the Summarize Values By tab of the Value Field Settings dialog box.