

Students Excel





Excel Dashboard (First Edition) Excel for Windows and Mac

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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.

Make Note of Spreadsheet ID

The screenshot shows the Students Excel website interface. On the left, a sidebar contains a 'Student Login' section with a 'Sign in to your account.' button (callout 2) and an email input field. The main content area features a 'My Assignments' section (callout 4) with a 'Spreadsheet ID: 5555 ?' (callout 3) and a list of assignments (callout 5). A 'Purchase New Assignment' button (callout 3) and a 'Questions / Help' link are also visible. A message at the bottom states 'You haven't submitted your work yet.' (callout 7). A callout (6) points to the 'Due Date' field, and another (7) points to the 'Submission date' field.

1. www.studentsexcel.com

2. Sign in to your account.

3. Make note of this number, which you'll use in several places throughout the assignment.

4. My Assignments

5. Assignment name appears here.

6. Due Date appears here.

7. Submission date appears here after you turn in your assignment.



This Exercise Requires Microsoft 365

1 AutoSave Off

File Home Insert Page Layout Formulas Data Review View Help

Info

Save

Save As

Print

Share

Export

Publish

Close

2 Account

Account Privacy

Manage Settings

Office Theme:

Colorful

3 Sign in to Office

Get to y
experien
use.

Sign

Subscription Product

Microsoft Office 365

This product contains

W X P O N P A

Manage Account Change License

You are entitled to a free copy of Microsoft Office 365. Log in with your university email and password at www.office365.com to download and install the latest version of Microsoft Office, which includes the newest version of Microsoft Excel.

Enable From Text (Excel for Windows Only)

1 File tab selected

2 Options button

3 Data category selected in Excel Options

4 'From Text (Legacy)' checked in 'Show legacy data import wizards'

5 OK button

6 Data ribbon selected

7 Get Data button

8 Legacy Wizards button

9 From Text (Legacy) command visible

If you cannot carry out these steps you're not using Office 365. Please refer to the Office 365 slide at the start of the presentation for information on how to access your free copy of the software.

From Text should now appear on the menu. We'll use this command later in the exercise. Don't click the command just yet.

Step 1 of 34: Create and Save Blank Workbook

1 Start with a blank Excel workbook. Press Ctrl+N or choose File, New and then double-click Blank Workbook if needed.

2 File

3 Save As

4 Browse

5 Desktop

You don't have to save the file to your desktop, but do save it somewhere where you can find it at the end to turn in .

6 Dashboard

File name: Dashboard

Save as type: Excel Workbook (*.xlsx)

Authors: David Ringstrom

7 ☒ Save Thumbnail

Click Save.

Step 2 of 34: Import Comma-Delimited File

Excel for Mac: Choose Data, Get External Data, From Text in lieu of steps 1 through 4.

Text Import Wizard - Step 1

The Text Wizard has determined the data type of the imported file. If this is correct, choose **Next** to import your data.

Original data type

7. Choose the file type that best describes your data.

☒ **Delimited** - Fields are separated by commas, semicolons, or other delimiters.

☐ Fixed width - Fields are separated by a fixed number of characters.

Start import at row: 1

☐ My data has headers.

Preview of file E:\FruitSales.csv

1	Region, City, Vendor, Sales
2	North GA, Atlanta, 10/28/2020 11:40 AM
3	North GA, Atlanta, 10/28/2020 11:40 AM
4	North GA, Atlanta, 10/28/2020 11:40 AM
5	North GA, Atlanta, 10/28/2020 11:40 AM

8. **Next >**

Step 3 of 34: Import Comma-Delimited File

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below

Delimiters

☐ Tab

☐ Semicolon

☒ Comma

☐ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

Region	City	Vendor	Product	Unit	Cases Sold	Total Sales
North GA	Atlanta	Fruit R Us	Oranges	Case	6168	61680
North GA	Atlanta	Fruit R Us	Apples	Case	6079	85106
North GA	Atlanta	Fruit R Us	Kiwi	Case	6058	66638
North GA	Atlanta	Fruit R Us	Bananas	Case	6868	75548

Cancel < Back Next > **Finish**

Import Data

Select how you want to view this data in your workbook

☒ Table

☐ PivotTable Report

☐ PivotChart

☐ Only Create Connection

Where do you want to put the data?

☒ Existing worksheet:

12

☐ New worksheet

☐ Add this data to the Data Model

Properties... **13** **OK** Cancel

	A	B	C
1	Region	City	Vendor
2	North GA	Atlanta	Fruit R Us
3	North GA	Atlanta	Fruit R Us
4	North GA	Atlanta	Fruit R Us
5	North GA	Atlanta	Fruit R Us
6	North GA	Atlanta	Fruit R Us
7			
8			
9	North GA	Atlanta	Bob's Fruit
10	North GA	Atlanta	Bob's Fruit

14 **YOUR TURN: Assign the name Data to this worksheet.**

Data (+)

Step 4 of 34: Set Query Properties

1 Select any cell within the list.

2 Data

3 Properties

NOTE: The Properties command will be disabled if you miss step 1 and your cursor is located outside of the list.

4 External Data Range Properties

Name: FruitSales

Query definition

☒ Save query definition

☐ Save password

4 Refresh control

☐ Prompt for file name on refresh

5 Refresh every 60 minutes

☒ Refresh data when opening the file

☐ Remove external data from worksheet before closing

Data formatting and layout

☒ Include field names ☐ Preserve column sort/filter/layout

☐ Include row numbers ☒ Preserve cell formatting

☒ Adjust column width

If the number of rows in the data range changes upon refresh:

☒ Insert cells for new data, delete unused cells

☐ Insert entire rows for new data, clear unused cells

☐ Overwrite existing cells with new data, clear unused cells

6 ☒ Fill down formulas in columns adjacent to data

7 OK

Unit	Cases Sold	Total Sale
Case	6,168	61,68
Case	6,079	85,10
Case	6,058	66,63
Case	6,868	75,54
Berries	1,996	29,94
Case	7,818	93,81
Case	1,565	21,91
Case	9,967	99,67
Case	9,842	98,42
Berries	8,993	89,93
Case	4,933	54,26
Case	7,704	107,85
Case	5,519	71,74
Case	8,442	126,63
Berries	889	11,55
Case	6,551	72,06
Case	2,605	31,26
Case	3,317	43,12
Case	7,411	81,52
Berries	6,227	93,40
Case	6,415	89,81

Step 5 of 34: Add Formulas

Step 1: Enter the formula `=G2/F2` in cell H2 to calculate Per Case Price.

Step 2: Right-click any cell within the list to open the context menu.

Step 3: Click the **Refresh** button in the bottom right corner of the spreadsheet.

Step 4: Excel copies the formulas down the column as needed when you refresh.

Step 5: The **Name Box** displays **FruitSales**.

Step 6: The **Name Box** displays **FruitSales** and the **Data** button is visible.

Step 7: Choosing the file name from the **Name box** in steps 5 and 6 allows you to navigate to the list from anywhere in the workbook.

	F	G	H
1	Cases Sold	Total Sales	Per Case Price
2	6,168	61,680	10
3	6,079	85,106	
4	6,058	66,638	
5	6,868	75,548	
6	1,996	29,940	
7	7,818	93,816	
8	1,565	21,910	
9	9,967	99,670	
10	9,842	98,420	

	F	G	H
1	Cases Sold	Total Sales	Per Case Price
2	6,168	61,680	10
3	6,079	85,106	14
4	6,058	66,638	11
5	6,868	75,548	11
6	1,996	29,940	15
7	7,818	93,816	12
8	1,565	21,910	14
9	9,967	99,670	10
10	9,842	98,420	10
11	8,993	89,930	10
12			
13			
14			
15			
16	889	11,557	13
17	6,551	72,061	11
18	2,605	31,260	12
19	3,317	43,121	13
20	7,411	81,521	11
21	6,227	93,405	15
22	6,415	89,810	14

	A	B	C
1	Region	City	Vendor
2	North GA	Atlanta	Fruit R Us
3	North GA	Atlanta	Fruit R Us

Step 6 of 34: Create PivotTable

1 Select any cell within the list.

2 Insert

3 PivotTable

4 OK

5 Region

Create PivotTable

Choose the data that you want to analyze

☒ Select a table or range

Table/Range: Data!\$A\$1:\$H\$51

☐ Use an external data source

Choose Connection...

Connection name:

☐ Use this workbook's Data Model

Choose where you want the PivotTable report to be placed

☒ New Worksheet

☐ Existing Worksheet

Location:

Choose whether you want to analyze multiple tables

☐ Add this data to the Data Model

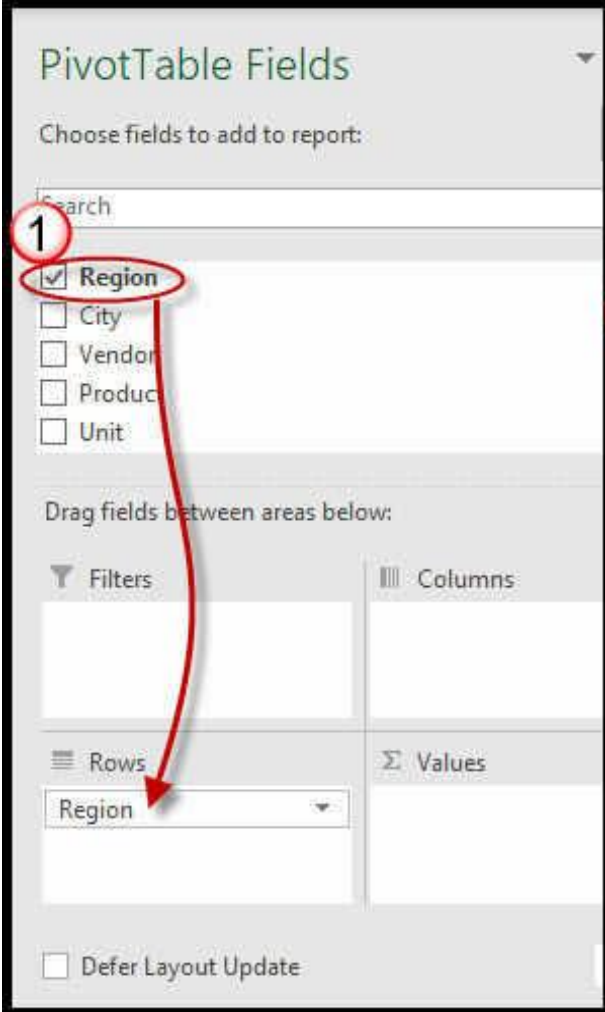
Worksheet Data:

Region	City	Vendor
North GA	Atlanta	Fruit R Us
North GA	Atlanta	Fruit R Us
North GA	Atlanta	Fruit R Us
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Orange U Glad
North GA	Atlanta	Orange U Glad
North GA	Atlanta	Orange U Glad
North GA	Atlanta	Orange U Glad
North GA	Atlanta	Orange U Glad
North GA	Blue Ridge	Mountain Fruit
North GA	Blue Ridge	Mountain Fruit
North GA	Blue Ridge	Mountain Fruit

PivotTable1

Click in this area to work with the PivotTable report

Step 7 of 34: Choose Fields



PivotTable Fields

Choose fields to add to report:

Search

1 ☒ **Region**

☐ City
☐ Vendor
☐ Product
☐ Unit

Drag fields between areas below:

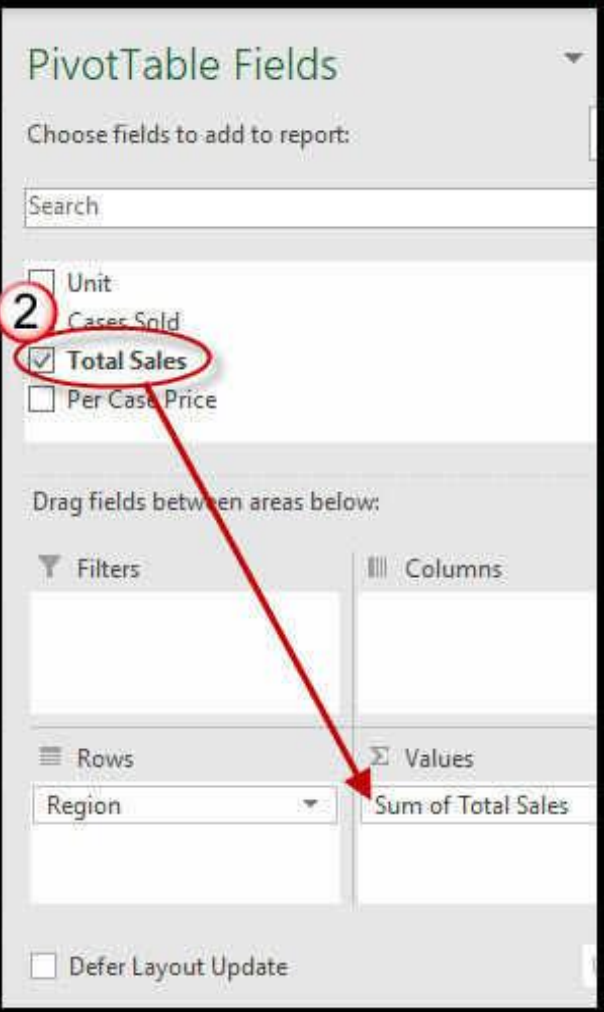
Filters

Columns

Rows
Region

Values

☐ Defer Layout Update



PivotTable Fields

Choose fields to add to report:

Search

☐ Unit
☐ Cases Sold
2 ☒ **Total Sales**
☐ Per Case Price

Drag fields between areas below:

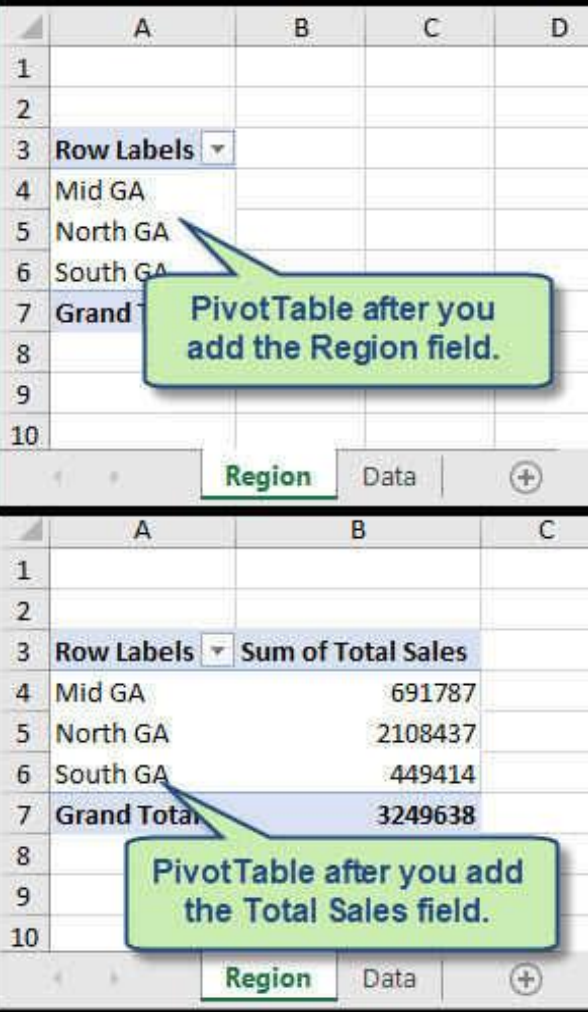
Filters

Columns

Rows
Region

Values
Sum of Total Sales

☐ Defer Layout Update



PivotTable after you add the Region field.

Region	Data
Mid GA	
North GA	
South GA	
Grand Total	

PivotTable after you add the Total Sales field.

Region	Sum of Total Sales
Mid GA	691787
North GA	2108437
South GA	449414
Grand Total	3249638

Step 8 of 34: Apply Number Format

1 Replace the words Row Labels with the word Region.

2 Remove the words Sum Of but keep the space before Total Sales.

3 Home

4 Choose Align Right.

5 YOUR TURN: Adjust the column widths to eliminate extraneous white space.

6 YOUR TURN: Format the numbers with commas.

7 View

8 Gridlines

Region	Total Sales
Mid GA	691,787
North GA	2,108,437
South GA	449,414
Grand Total	3,249,638

Step 9 of 34: Automatic PivotTable Refresh

The screenshot shows the Microsoft Excel interface with the PivotTable Analyze tab selected. The PivotTable Options dialog box is open, and the Data tab is active. The 'Refresh data when opening the file' checkbox is checked. The background shows a PivotTable with 'Region' as the filter and 'Total Sales' as the value field.

1 PivotTable Analyze

2 Options

3 Data

4 Refresh data when opening the file

5 OK

Region	Total Sales
Mid GA	691,787
North GA	2,108,437
South GA	449,414
Grand Total	3,249,638

Step 10 of 34: Replicate the PivotTables

1

City	Total Sales
Atlanta	1,416,079
Blue Ridge	383,506
Brunswick	235,373
Clarkesville	308,852
Macon	691,787
Valdosta	214,041
Grand Total	3,249,638

YOUR TURN: Make a copy of the Region worksheet and adapt it to become a City pivottable.

Region **City** Data

2

Vendor	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Fruit R Us	318,912
Fruitju	372,053
Middle Georgia Fruit	196,017
Mountain Fruit	383,506
Navel Oranges & More	235,373
Orange U Glad	321,368
Oranges 'n Onions	214,041
Whistlestop Fruit Stand	495,770
Grand Total	3,249,638

YOUR TURN: Make a copy of the City worksheet and adapt it to become a Vendor pivottable.

Region City **Vendor** Data

3

Product	Total Sales
Apples	614,847
Bananas	756,649
Kiwi	643,277
Mixed Berries	518,888
Oranges	715,977
Grand Total	3,249,638

YOUR TURN: Make a copy of the Vendor worksheet and adapt it to become a Product pivottable.

... Vendor **Product** Data

Step 11 of 34: Top 10 Pivot Table

Top 5 Vendors	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Fruit R Us	318,912
Fruitju	372,053
Middle Georgia Fruit	196,017
Mountain Fruit	383,506
Navel Oranges & More	235,373
Orange U Glad	321,368
Oranges 'n Onions	214,041
Whistlestop Fruit Stand	495,770
Grand Total	3,249,638

1 YOUR TURN: Make a copy of the Vendor worksheet and adapt it to become a Top 5 Vendors pivottable.

Top 5 Vendors

Top 5 Vendors	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Fruit R Us	318,912
Fruitju	372,053
Middle Georgia Fruit	196,017
Mountain Fruit	383,506
Navel Oranges & More	235,373
Orange U Glad	321,368
Oranges 'n Onions	214,041
Whistlestop Fruit Stand	495,770
Grand Total	3,249,638

2

Sort A to Z
Sort Z to A
More Sort Options...

Clear Filter From "Vendor"

3 Label Filters
Value Filters

Search

- ☒ (Select All)
- ☒ Bob's Fruit
- ☒ Fruit Direct
- ☒ Fruit R Us
- ☒ Fruitju
- ☒ Middle Georgia Fruit
- ☒ Mountain Fruit
- ☒ Navel Oranges & More
- ☒ Orange U Glad

OK Cancel

Excel for Mac: click Choose One in the By value field in lieu of step 4.

Clear Filter

- Equals...
- Does Not Equal...
- Greater Than...
- Greater Than Or Equal To...
- Less Than...
- Less Than Or Equal To...
- Between...
- Not Between...
- 4** Top 10...

Step 12 of 34: Top 5/Bottom 3 PivotTable

Excel for Mac: Click the red dot in the corner of the dialog box in lieu of step 6.

5

6

Top 5 Vendors	Total Sales
Middle Georgia Fruit	196,017
Oranges 'n Onions	214,041
Navel Oranges & More	235,373
Grand Total	645,431

7

YOUR TURN: Sort the Total Sales in descending order.

Top 5 Vendors	Total Sales
Whistlestop Fruit Stand	495,770
Bob's Fruit	403,746
Mountain Fruit	383,506
Fruitju	372,053
Orange U Glad	321,368
Grand Total	1,976,443

8

YOUR TURN: Create a Bottom 3 Vendors pivottable that is sorted in ascending order.

Bottom 3 Vendors	Total Sales
Whistlestop Fruit Stand	495,770
Bob's Fruit	403,746
Mountain Fruit	383,506

Step 13 of 34: Create Clustered Bar PivotChart

1 Select any cell within the Top 5 Vendors pivottable.

Top 5 Vendors	Total Sales
Whistlestop Fruit Stand	495,770
Bob's Fruit	403,746
Grand Total	1,976,443

2 Insert

3 2-D Column

4 Clustered Column

Use this chart type to:

- Compare values across a categories.

5 PivotChart Analyze

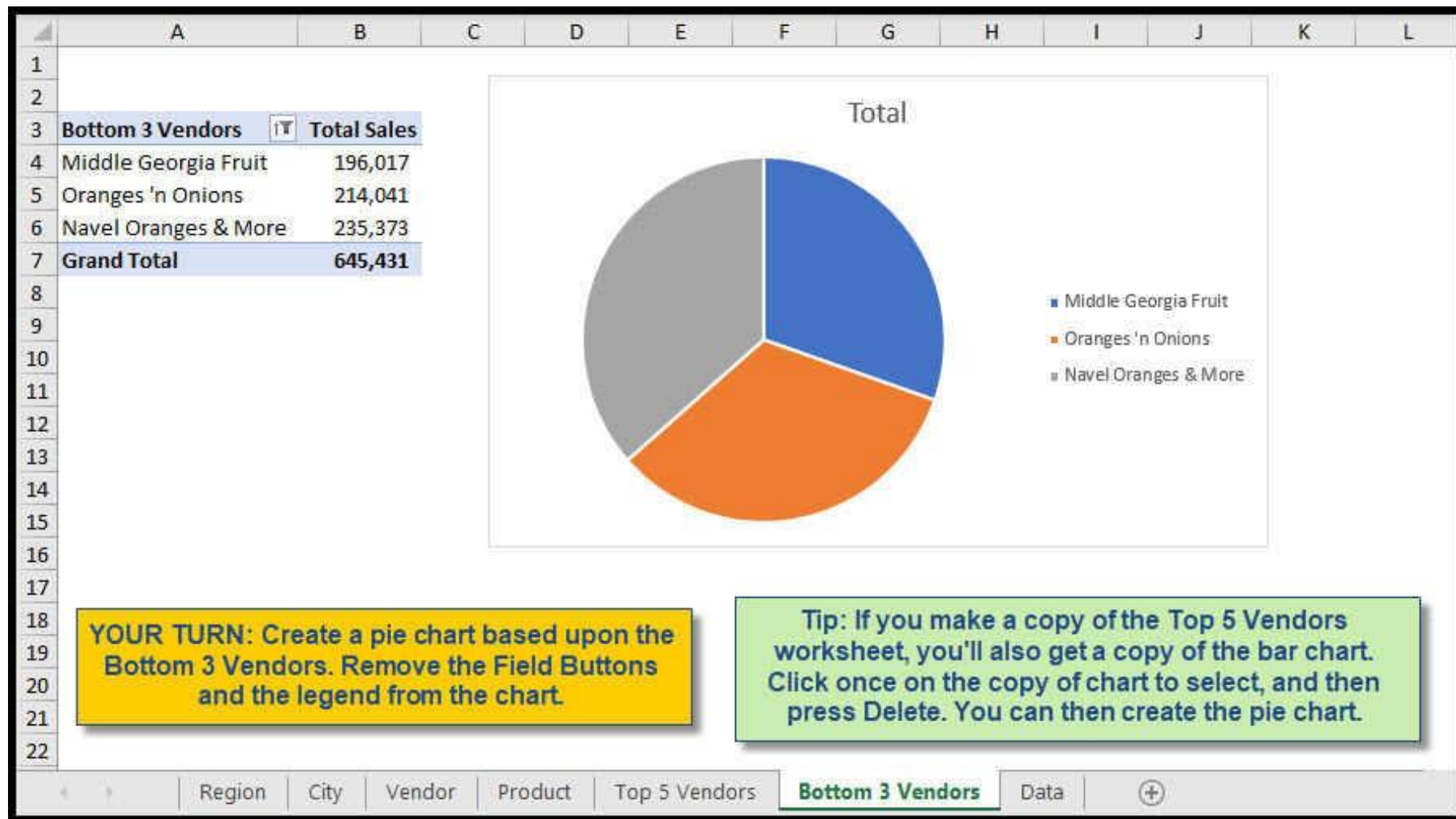
Excel for Mac: Skip step 6 as the buttons do not appear in that version of Excel.

6 Field List Buttons

7 Click on Total and press Delete to remove the redundant legend.

Tip: The Total Sales and Vendors buttons should vanish from the chart once you carry out steps 5 and 6.

Step 14 of 34: Create Pie PivotChart



Step 15 of 34: Format Pie Chart

1 Click on the chart.

2 [Icon: Add Chart Element]

3 Chart Elements

- ☒ Chart Title
- ☐ Data Labels
- ☐ Legend

4 Best Fit, Data Callout (selected), More Options...

Excel for Mac: In lieu of steps 1 through 4 choose the Design menu, click Add Chart Element, Data Labels, and then Data Callout.

5 Right-click the chart itself (Excel for Mac shift-click on the chart.)

6 Format Data Series...

7 5%

8 The pie chart should be exploded.

Region	City	Vendor	Product	Top 5 Vendors	Bottom 3 Vendors	Data

Format Data Series

Series Options

Angle of first slice: 0°

Pie Explosion: 5%

Step 16 of 34: Rename pivot tables

1 Dashboard.xlsx

2 Table Name: Region1234

Assign the name RegionXXXX where XXXX is your 4 digit spreadsheet ID to the region pivottable.

4 PivotTable Name: Vendor1234

Assign the name VendorXXXX where XXXX is your 4 digit spreadsheet ID to the vendor pivottable.

6 PivotTable Name: Top5_1234

Assign the name Top5_XXXX where XXXX is your 4 digit spreadsheet ID to the top 5 pivottable.

3 PivotTable Name: City1234

Assign the name CityXXXX where XXXX is your 4 digit spreadsheet ID to the city pivottable.

5 PivotTable Name: Product1234

Assign the name ProductXXXX where XXXX is your 4 digit spreadsheet ID to the product pivottable.

7 PivotTable Name: Bottom3_1234

Assign the name Bottom3_XXXX where XXXX is your 4 digit spreadsheet ID to the bottom 3 pivottable.

Step 17 of 34: Insert Slicers

Panel 1: Selecting a cell in the pivot table

1 Click any cell within the vendor pivottable.

Vendor	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Fruit Direct	312
Fruit Direct	53
Mountain Fruit	383,506
Navel Oranges & More	235,373

Panel 2: Insert Slicers dialog box

4 Region
5 City
Vendor
Product
Unit
Cases Sold
Total Sales
Per Case Price

6 OK Cancel

Panel 3: Worksheet with slicers

7 Two slicers appear on your worksheet. Use your mouse to move the Product slicer to the right of the City slicer.

City: Atlanta
Product: Apples, Bananas, Kiwi, Mixed Berries, Oranges

Step 18 of 34: Slicer Demonstration

Left Screenshot: Vendor Pivot Table

Vendor	Total Sales
Bob's Fruit	115,726
Fruit R Us	146,786
Fruitju	162,119
Orange U Glad	103,321
Grand Total	527,952

City Slicer: Atlanta, Blue Ridge, Brunswick, Clarkesville, Macon, Valdosta

Product Slicer: Apples, Bananas, Kiwi, Mixed Berries, Oranges

Callouts:

- 1: Click on Atlanta to see sales by vendor just in Atlanta.
- 2: Choose Apples to see sales of Apples in Atlanta by vendor.
- 3: Hold down the Ctrl (or Cmd on Mac) key to see sales of both Apples and Oranges by vendor in Atlanta.

Right Screenshot: City Pivot Table

City	Total Sales
Atlanta	1,416,079
Blue Ridge	383,506
Brunswick	235,373
Clarkesville	308,852
Macon	691,787
Valdosta	214,041
Grand Total	3,249,638

Callout:

- 4: Presently only the vendor pivot table is being filtered, or sliced, if you will. We'll connect the slicers to the other pivottables.

Step 19 of 34: Slicing Multiple PivotTables

1 Right-click on the City slicer (or shift-click in Excel for Mac)

2 Report Connections...

3

4 OK

5 YOUR TURN: Carry out the same steps on the Product slicer.

Name	Sheet
Bottom3_1234	Bottom 3 Vendors
City1234	City
Product1234	Product
Region1234	Region
Top5_1234	Top 5 Vendors
Vendor1234	Vendor

Step 20 of 34: Adding PivotTable Filters

Step 1: Click both Clear Filter buttons to redisplay all items.

Step 2: Select any cell within the Vendor pivottable.

Step 3: Add City and Product as filters.

Step 4: Drag fields between areas below:

Step 5: Two new fields appear above the pivottable that we'll use to create dynamic titles for the two pivot charts.

Vendor	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Mountain Fruit	383,506
Navel Oranges & More	235,373
Grand Total	3,249,638

Step 21 of 34: Dynamic PivotTable Chart Titles

Step 1: Enter this formula in cell A1 of the Top 5 Vendors pivottable.

Step 2: Add "&" Sales for " to the end of the formula in cell A1.

Step 3: Click the Save button to save your work.

Top 5 Vendors PivotTable Data:

Vendor	Total Sales
Whistlestop Fruit Stand	495,770
Bob's Fruit	403,746
Mountain Fruit	383,506
Fruitju	372,053
Orange U Glad	321,368
Grand Total	1,976,443

Excel Ribbon: File, Home, Insert, Page Layout. The Save button is highlighted.

Step 22 of 34: Dynamic PivotTable Chart Titles

5 Add this part to the formula, after the closing " in your existing formula.

6 Add "Top 5 Vendors&CHAR(10)& after the equal sign and before the first IF function.

7 Click on the chart title to select it.

8 Type an equal sign in the formula bar.

9 Click on cell A1 and then press Enter.

Region	City	Vendor	Product	Total Sales
		Whistlestop Fruit Stand		495,770
		Bob's Fruit		403,746
		Mountain Fruit		383,506
		Fruitju		372,053
		Orange U Glad		321,368
		Grand Total		1,976,443

Chart 1

Top 5 Vendors

Total

Step 23 of 34: Bottom 3 Dynamic Chart Title

A1

= "Top 5 Vendors"&CHAR(10)&IF(Vendor!B2="(All)", "All Products", Vendor!B2)&" Sales for "&IF(Vendor!B1="(All)", "All Cities", Vendor!B1)

The entire formula. The CHAR function enables us to use non-printable characters in a formula. In this case CHAR(10) gives us a carriage return, which wraps our chart title onto two rows. This isn't apparent in cell A1 unless you click on cell A1 and choose Wrap Text, which is optional for this assignment.

Top 5 Vendors
All Products Sales for All Cities

YOUR TURN: Click on the Chart Title and apply bold and underline formatting.

Bottom 3 Vendors

YOUR TURN: Craft a similar formula that will display Bottom 3 Vendors All Products Sales for All Cities. Use the IF and CHAR functions as shown for the Top 5 chart, and then link the formula to the chart title and provide bold and underline formatting.

Total

Middle Georgia Fruit 30%

Bottom 3 Vendors

Region City Vendor Product Top 5 vendors

Step 24 of 34: Creating a Linked Picture

1 YOUR TURN: Insert a new worksheet at the start of the workbook. assign the name Dashboard, and remove the gridlines.

2 Select the Region pivottable.

3 Home

4 Choose Copy.

5 Select cell A1 on the Dashboard worksheet.

6 Excel for Mac: the arrow appears to the right instead of the bottom.

7 Linked Picture (I)

Region	Total Sales
Mid GA	691,787
North GA	2,108,437
South GA	449,414
Grand Total	3,249,638

Step 25 of 34: Add Picture Border

The screenshot shows an Excel dashboard with a table of sales data and a picture format task pane. The steps are numbered 1 through 5:

- Click once on the linked picture.
- Click on the **Picture Format** tab in the ribbon.
- Click on the **Picture Border** dropdown arrow.
- Click on **Weight** in the border options.
- Click on **3 pt** in the weight list.

The data table on the left is as follows:

	A	B	C	D
1	Region	Total Sales		
2	Mid GA	691,787		
3	North GA	2,108,437		
4	South GA	449,414		
5	Grand Total	3,249,638		

The task pane on the right shows the **Picture Format** tab with the **Picture Border** dropdown menu open, displaying various color and weight options. The **Weight** option is selected, and the **3 pt** weight is chosen from the list.

Step 26 of 34: Assembling the Dashboard

1 Move the linked picture slightly so that the border can be seen on all four sides.

Region	Total Sales
Mid GA	691,787
North GA	2,108,437
South GA	449,414
Grand Total	3,249,638

Region	Total Sales
Mid GA	691,787
North GA	2,108,437
South GA	449,414
Grand Total	3,249,638

City	Total Sales
Atlanta	1,416,079
Blue Ridge	383,506
Brunswick	235,373
Clarkesville	308,852
Macon	691,787
Valdosta	214,041
Grand Total	3,249,638

Vendor	Total Sales
Bob's Fruit	403,746
Fruit Direct	308,852
Fruit R Us	318,912
Fruitju	372,053
Middle Georgia Fruit	196,017
Mountain Fruit	383,506
Navel Oranges & More	235,373
Orange U Glad	321,368
Oranges 'n Onions	214,041
Whistlestop Fruit Stand	495,770
Grand Total	3,249,638

Product	Total Sales
Apples	614,800
Bananas	756,600
Kiwi	643,200
Mixed Berries	518,800
Oranges	715,900
Grand Total	3,249,638

Top 5 Vendors	Total Sales
Whistlestop Fruit Stand	495,770
Bob's Fruit	403,746
Mountain Fruit	383,506
Fruitju	372,053
Orange U Glad	321,368
Grand Total	1,980,343

Bottom 3 Vendors	Total Sales
Middle Georgia Fruit	196,017
Oranges 'n Onions	214,041
Navel Oranges & More	235,373
Grand Total	645,431

2 YOUR TURN: Create linked pictures for the other pivot tables. The exact placement is at your discretion, so don't try to necessarily get things in exactly the same position.

Dashboard | Region ... (+)

Dashboard | Region | City | Vendor | Product | Top 5 Vende ... (+)

Step 27 of 34: Move Charts to Dashboard

1 Right-click (or shift-click in Excel for Mac) on the Top 5 Vendors chart.

2 Move Chart...

3 Object in: Dashboard

4 OK

5 YOUR TURN: Move the chart to the bottom left-hand corner of the dashboard. Resize the chart if necessary, but you can keep the current size if you have room on-screen.

6 Move the Bottom 3 Chart in the same fashion to the right-hand side of the dashboard.

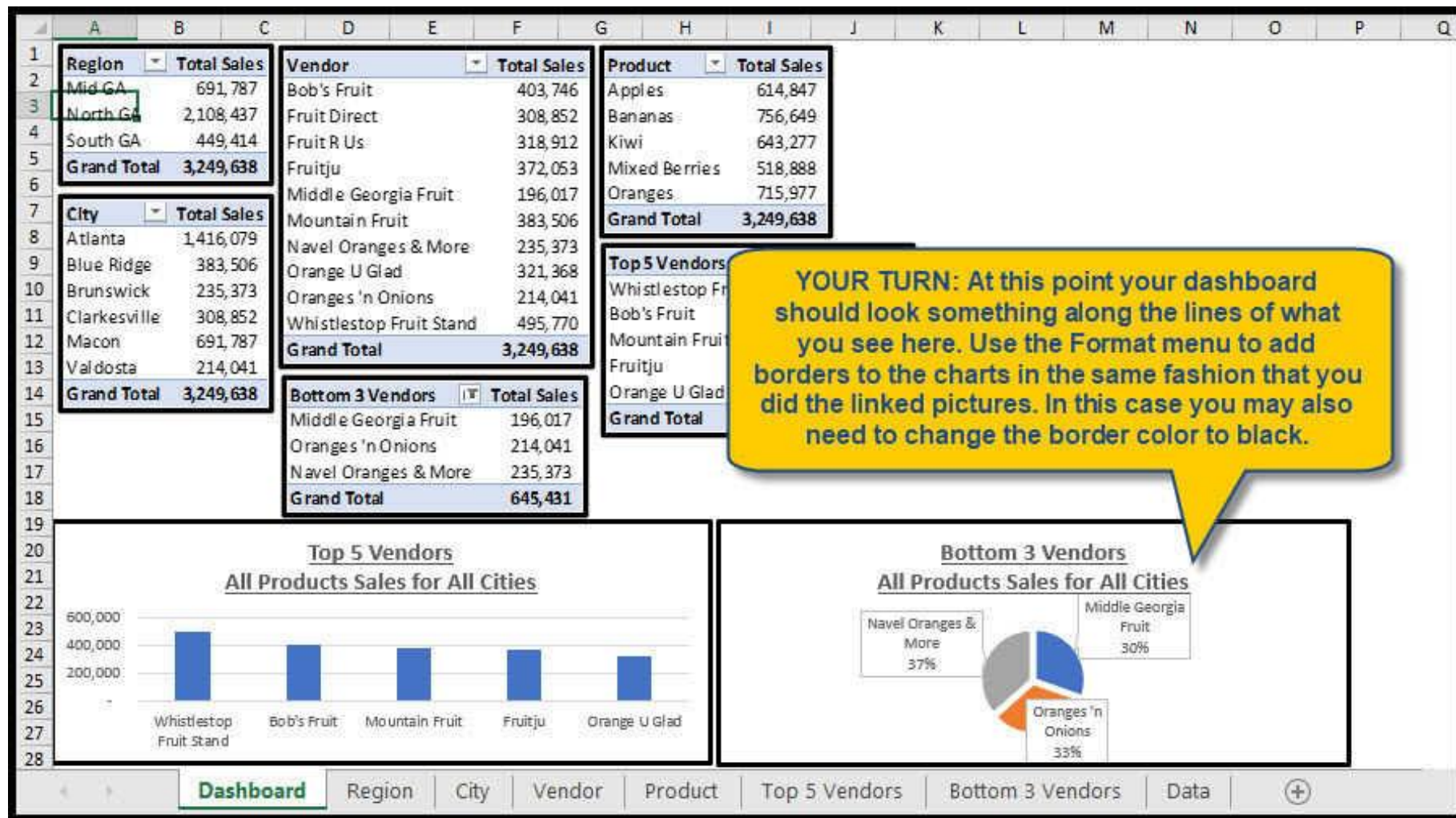
Top 5 Vendors

Vendor	Value
Whistlestop Fruit Stand	400,000
Mountain Fruit	300,000
Fruitju	200,000
Orange	100,000
Grand Total	1,000,000

Dashboard

Vendor	Value
Whistlestop Fruit Stand	400,000
Mountain Fruit	300,000
Fruitju	200,000
Orange	100,000
Grand Total	1,000,000

Step 28 of 34: Adding Borders to the Charts



Step 29 of 34: Move Slicers to Dashboard

The image consists of three sequential screenshots from Microsoft Excel, illustrating the process of moving a slicer to a dashboard.

Step 1: The first screenshot shows a PivotTable with a 'City' slicer. A yellow callout box with a red circle around the number 1 says "Right-click the City Slicer." The 'City' slicer is visible on the left side of the PivotTable.

Step 2: A second yellow callout box with a red circle around the number 2 says "Cut". The 'Cut' option is highlighted in the right-click context menu for the 'City' slicer.

Step 3: The second screenshot shows a dashboard with a table titled "All Products Sales for All Cities". A yellow callout box with a red circle around the number 3 says "Right-click any cell on the Dashboard." A red rectangle highlights a cell in the dashboard table, and a right-click context menu is open.

Step 4: A third yellow callout box with a red circle around the number 4 says "Paste Options:". The 'Paste Options' option is highlighted in the right-click context menu on the dashboard.

Step 5: The third screenshot shows the 'City' slicer moved to the dashboard, appearing as a filter for the table. A yellow callout box with a red circle around the number 5 says "The slicer should now appear on the dashboard." The 'City' slicer is now part of the dashboard interface.

Step 6: A final yellow callout box with a red circle around the number 6 says "YOUR TURN: Move the Product slicer in the same fashion." This indicates the next step in the process.

Step 30 of 34: Format Slicers

The screenshot shows the Excel interface with the Slicer task pane open on the right. The task pane has several sections: Slicer Caption, Report Connections, Quick Styles, Arrange, Buttons, and Size. Annotations with numbered circles point to specific elements:

- 1** Points to the City Slicer in the worksheet.
- 2** Points to the Slicer tab in the task pane.
- 3** Points to the Columns property in the Buttons section of the task pane.
- 4** Points to the Quick Styles section in the task pane.
- 5** Points to the Product Slicer in the worksheet.

Yellow callout boxes provide instructions:

- Box 1: "Click on the City Slicer."
- Box 4: "Pick a color or style of your choice from the Quick Styles section."
- Box 5: "YOUR TURN: Change the Products slicer to have two columns and a different style than the City slicer."

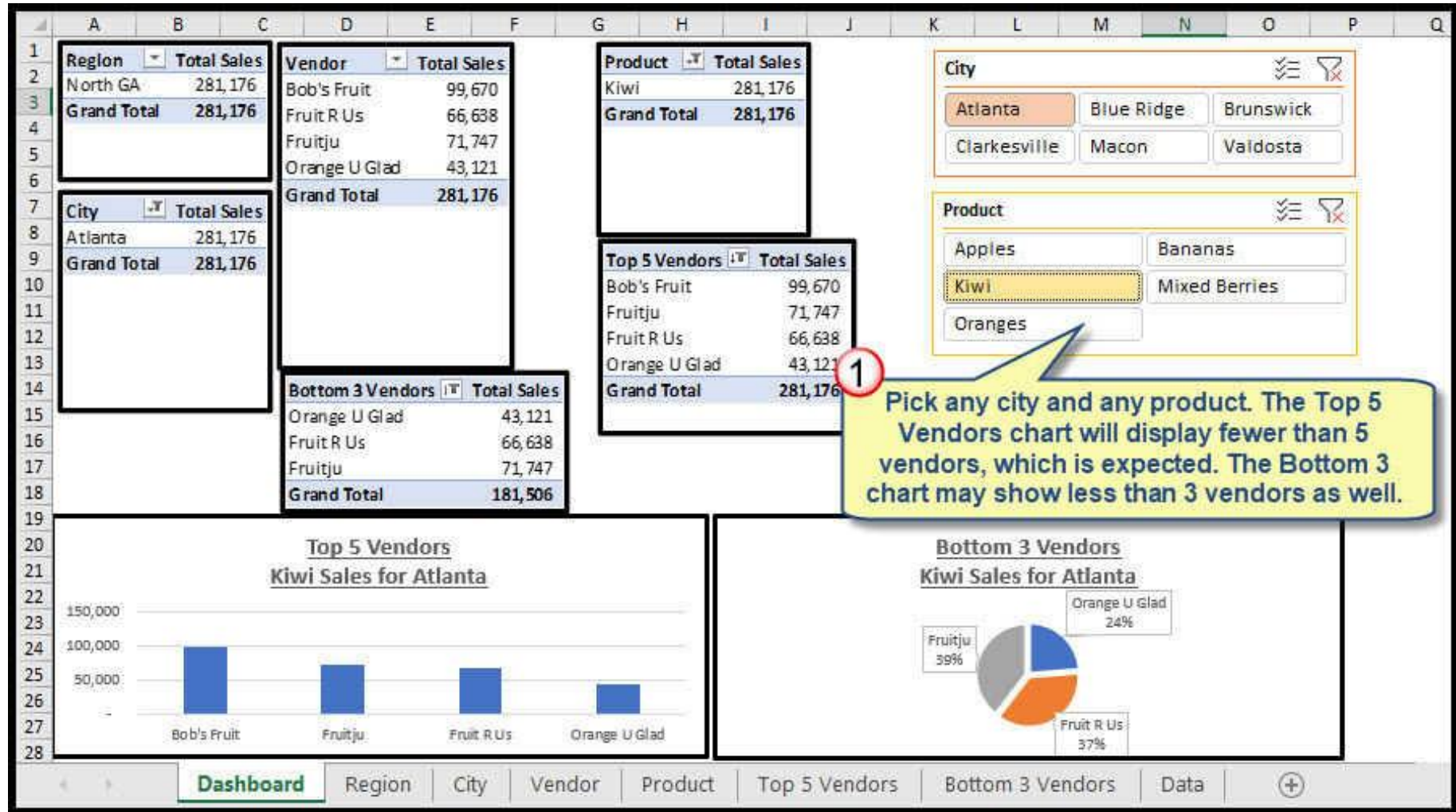
The worksheet data is as follows:

City	Total Sales
Atlanta	756,649
Blue Ridge	643,277
Brunswick	518,888
Clarkesville	715,977
Macon	3,249,638
Valdosta	

Product	Total Sales
Apples	495,770
Bananas	403,746
Kiwi	383,506
Mixed Berries	372,053
Oranges	321,368

The bottom of the screen shows the worksheet tabs: Dashboard, Region, City, Vendor, Product, Top 5 Vendors, Bottom 3 Vendors, and Data.

Step 31 of 34: Slice a City and a Product



1 Pick any city and any product. The Top 5 Vendors chart will display fewer than 5 vendors, which is expected. The Bottom 3 chart may show less than 3 vendors as well.

Step 32 of 34: PivotTable Drill-Down

1 Excel for Windows: Double-click the Region linked picture.
Excel for Mac: Manually activate the Region worksheet.

2 Double-click the Grand Total Amount. Your region may differ depending up on what you choose in the slicer.

3 Excel creates a drill-down worksheet to show the underlying details. Assign the name Drill-Down to this worksheet.

4 ☒ Header Row ☐ First Column
☒ Total Row ☐ Last Column
☒ Banded Rows ☐ Banded Columns

5 YOUR TURN: Display the Sum for Cases Sold and Total Sales, and the Average for Per Case Price.

Region	Total Sales	Vendor
North GA	281,176	Bob's Fruit
Grand Total	281,176	Fruit R Us Fruitju

Region	City	Vendor	Product	Unit	Cases Sold	Total Sales	Per Case
North GA	Atlanta	Orange U C	Kiwi	Case	3317	43121	
North GA	Atlanta	Fruitju	Kiwi	Case	5519	71747	
North GA	Atlanta	Fruit R Us	Kiwi	Case	6058	66638	
North GA	Atlanta	Bob's Fruit	Kiwi	Case	9967	99670	

Region	Total Sales	Per Case Price
North GA	281,176	13
Grand Total	281,176	13

Cases Sold	Total Sales	Per Case Price
24861	281176	11.75

Step 33 of 34: Insert Text Box

1 Select any cell beneath the dashboard.

2 Click the **Insert** tab on the ribbon.

3 Click the **Text Box** icon in the Insert ribbon.

4 Draw a rectangle of this approximate size. You don't have to be precise here with sizing.

5 Hold down your left mouse button and draw a rectangle of this approximate size. You don't have to be precise here with sizing.

6 Type a couple of sentences that describe your thoughts (good or bad) about this assignment. You'll see that text wraps automatically in a text box, much like a Word document.

Press Enter a couple of times to see how you can skip a line.

Click any cell once you're done editing the text box. Double-click inside the text box if you wish to edit the text again.

Step 34 of 34: Submit Your Work

1 **IMPORTANT: Close Excel.**

Want to save your changes to 'Aging Schedules.xlsx'?

2 **Save** Don't Save Cancel

3 studentsexcel.com

4 Student Login

5 **MAKE SURE THAT YOUR WORKBOOK IS NOT OPEN IN EXCEL.** Then follow the prompts after you click Submit Exercise. **You will upload a corrupted file if you leave it open in Excel.**

ACCT 3100 Intermediate Financial Accounting I

Watch Video Download Exercise **Submit Exercise**

6 A confirmation appears onscreen. Click the file name to download and check your work. Click the Submit Newer Version button if you wish to resubmit your work.

My Assignments | **Spreadsheet ID: 5586**

Aging Schedules Due 10/28/2016 11:58 PM

✓ You submitted the file Aging Schedules.xlsx on 10/28/2016 to 10:28 AM