

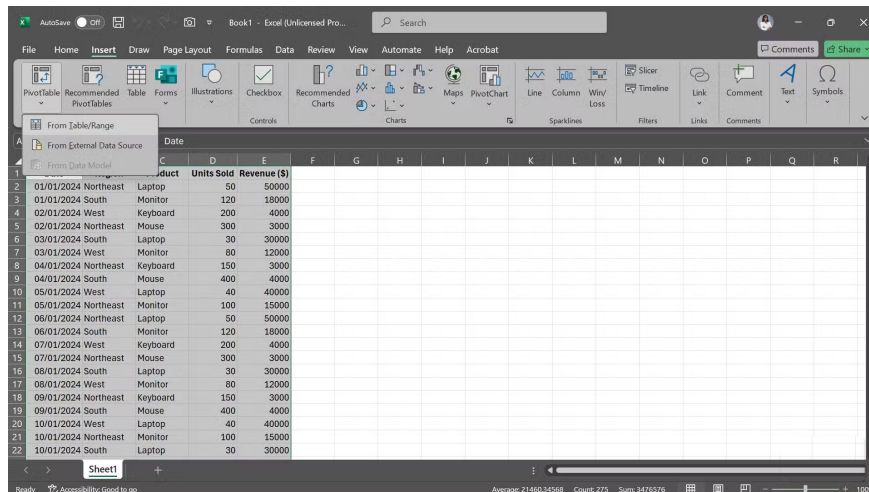
5 Excel dashboard tricks that will save you hours when you're just starting out

What most people don't realize at the time is that just a few simple techniques can save countless hours and make the whole process a lot less difficult.

Remember the first time you tried to create a dashboard in Excel ? You stared at rows of data, fiddled with formulas, and struggled with chart placement, only to end up with a messy spreadsheet that was nearly unusable. What most people don't realize at the time is that a few simple techniques can save countless hours and make the whole process much less daunting.

Pivot Table

Summarize thousands of rows in seconds without formulas



PivotTable from table or range

Select a table or range

Table/Range: Sheet1!\$A\$1:\$E\$1500

Choose where you want the PivotTable to be placed

New Worksheet

Existing Worksheet

Location:

Choose whether you want to analyze multiple tables

Add this data to the Data Model

OK Cancel

Date	Region	Product	Units Sold	Revenue (\$)
01/01/2024	Northeast	Laptop	50	50000
01/01/2024	South	Monitor	120	18000
02/01/2024	West	Keyboard	200	4000
02/01/2024	Northeast	Mouse	300	3000
03/01/2024	South	Laptop	30	30000
03/01/2024	West	Monitor	80	12000
04/01/2024	Northeast	Keyboard	150	3000
04/01/2024	South	Mouse	400	4000
05/01/2024	West	Laptop	40	40000
05/01/2024	Northeast	Monitor	100	15000
06/01/2024	Northeast	Laptop	50	50000
06/01/2024	South	Monitor	120	18000
07/01/2024	West	Keyboard	200	4000
07/01/2024	Northeast	Mouse	300	3000
08/01/2024	South	Laptop	30	30000
08/01/2024	West	Monitor	80	12000
09/01/2024	Northeast	Keyboard	150	3000
09/01/2024	South	Mouse	400	4000
10/01/2024	West	Laptop	40	40000
10/01/2024	Northeast	Monitor	100	15000
10/01/2024	South	Laptop	30	30000

PivotTable Fields

Choose fields to add to report:

Search

Date

Region

Product

Units Sold

Revenue (\$)

Drag fields between areas below:

Filters Columns

Rows Values

Defer Layout Update

Ready Accessibility: Investigate

PivotTable Fields

Choose fields to add to report:

Search

Region

Product

Units Sold

Revenue (\$)

More Tables...

Drag fields between areas below:

Filters Columns

Region Product

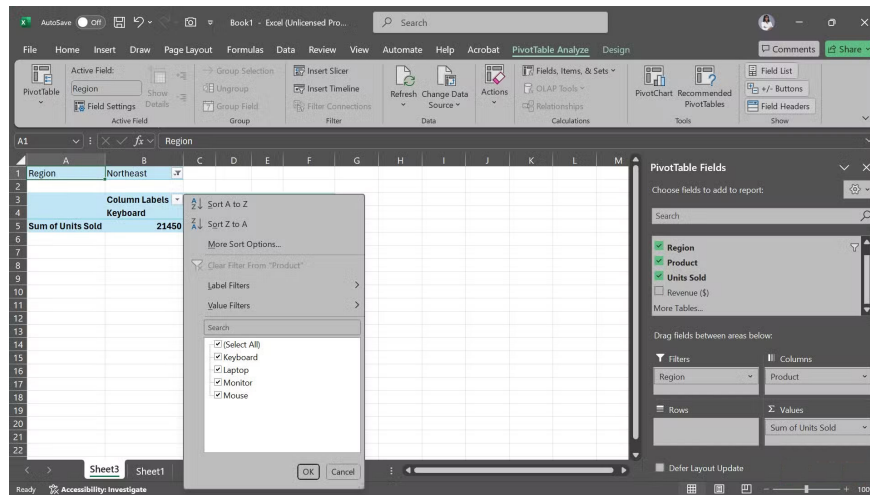
Rows Values

Sum of Units Sold

Defer Layout Update

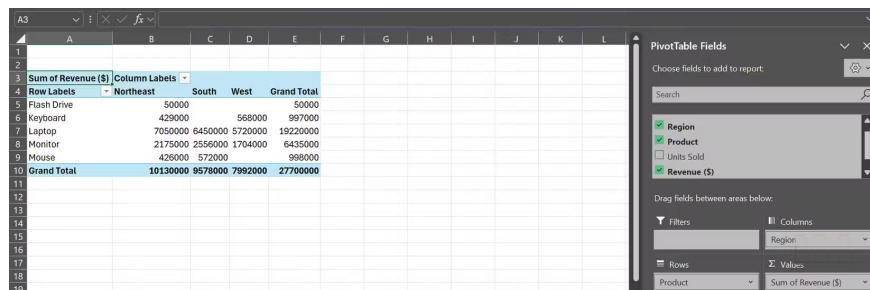
Ready Accessibility: Investigate

Region	Keyboard	Laptop	Monitor	Mouse	Grand Total
Sum of Units Sold	21450	7100	14500	42800	85650



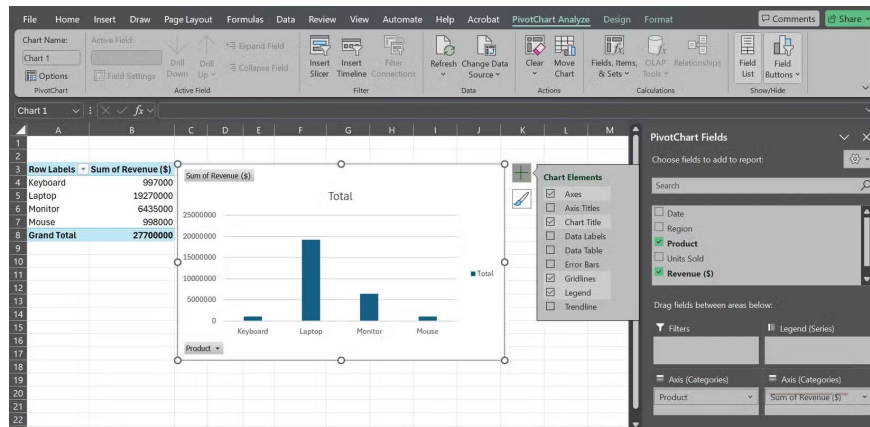
Pivot Tables may sound confusing, but they're one of Excel's most powerful tools for working with large data sets. Instead of writing complex formulas to calculate sums, averages, or counts, you can simply drag and drop fields into place.

To create a Pivot Table, start by selecting your data range. Then, go to **Insert > Tables > PivotTable > From Table/Range** . When Excel asks where to put it, people often choose **New Worksheet** . On the new worksheet, you'll see the column headers in the right-hand pane. From there, just drag them into the **Rows** , **Columns** , **Values** ??, or **Filters** areas, depending on how you want to analyze your data.



Pivot Chart

Visualize PivotTable data with just one click

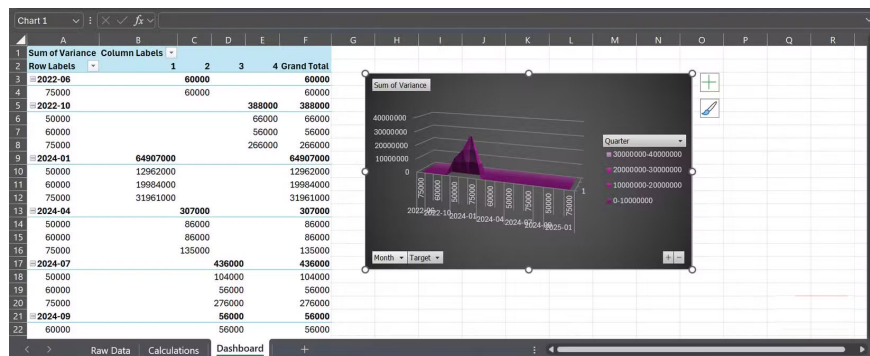


Once you've built a PivotTable, converting it to a chart is almost too easy. Just click anywhere inside the table, go to **Insert > PivotChart**, and select the type of chart you want. You'll even get suggestions for the best chart for your data.

Once you select the appropriate type, Excel will immediately create a dynamic chart that automatically updates whenever the PivotTable changes. You'll see a plus icon and a paintbrush icon next to the chart. Click on them and you'll be able to adjust the axes, labels, styles, etc. to suit your dashboard.

Helper Sheet

Keep raw data and complex calculations out of the main dashboard view



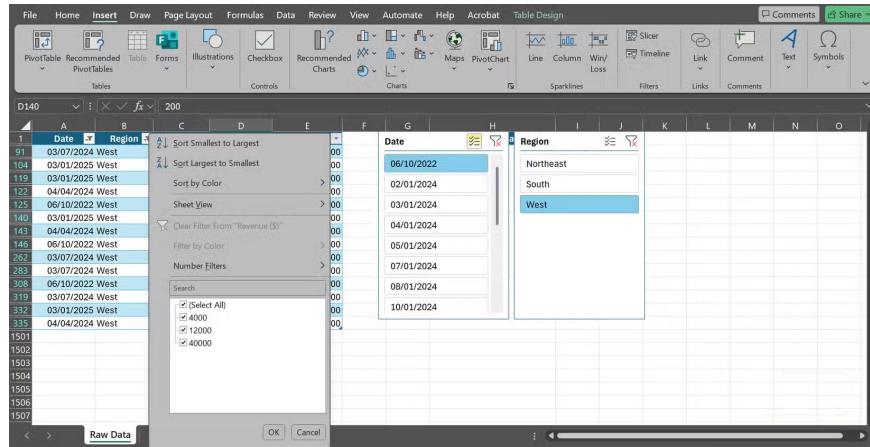
When first starting out with dashboards, many people try to cram everything—raw data, formulas, charts, and formatting—into a single sheet. The result is messy, confusing, and nearly impossible to troubleshoot when things go wrong.

That's where Helper Sheets come in. By separating your background work from your polished dashboard, you keep things much more organized and easier to maintain. Helper sheets are different from helper columns, which are extra columns you add inside your data set to make formulas easier to understand.

An efficient setup is to have one sheet for raw data, another sheet for calculations, and a final sheet for the dashboard itself, which only displays the charts, key figures, and slices.

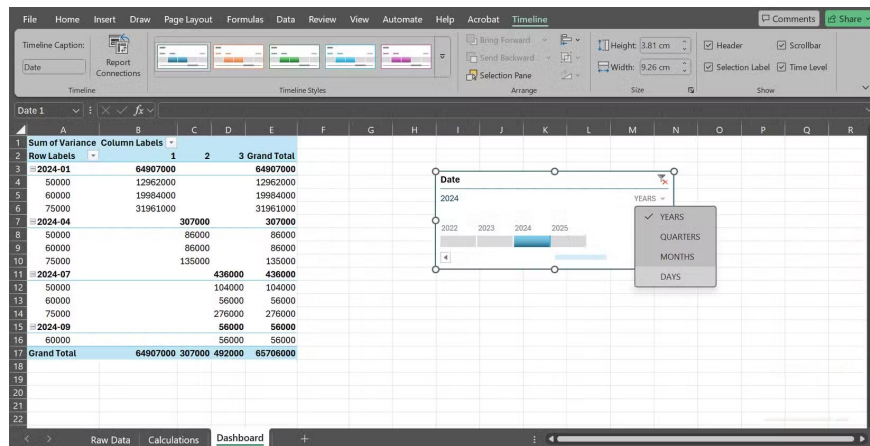
Slicers and filters

Quickly focus on relevant records



Slicers are visual filters that let you explore data without writing any formulas. They are especially powerful when combined with Pivot Tables and Pivot Charts, as you can filter and compare results instantly. However, they also work with regular Excel tables.

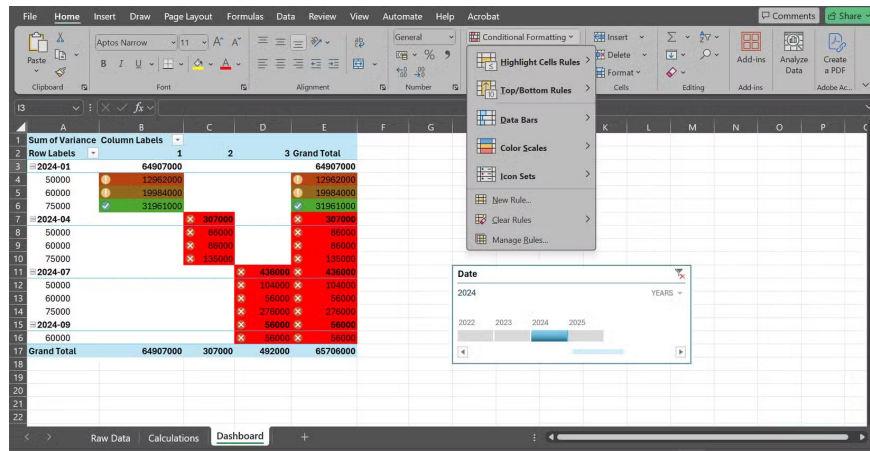
To add a slicer, click in your table or Pivot Table, go to **Insert > Slicer**, and select the fields you want to filter by (region, date, etc.). Excel will create a panel of buttons that act as filters. If you only want to see Q1 results for the West region, just click the region and quarter buttons. For time-based data, you can also insert a timeline slicer (**Insert > Timeline**) to move between years, days, quarters, or months with just one click.



However, traditional filters still play an important role.

Conditional formatting

Highlight data with visual alerts



Numbers alone can be boring. Conditional formatting adds colors, icons, and data bars to instantly highlight patterns.

For example, you can turn a simple table into a heat map in seconds. Select your cell range, go to **Home > Conditional Formatting > Color Scales**, and choose a color scale. High values might appear green, low values red, and all the values in between have shades that show exactly where they are. Instead of scanning rows of numbers, your eyes will go straight to the hot spots.

However, it's important to use these features sparingly. Too many formats will create visual noise rather than clarity. Reserve them for the most important figures or exceptions, so the correct information stands out when needed.

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