

How to Calculate Totals from Two Columns in an Excel Pivot Table

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In the modern discipline of [data analysis](#), the [Microsoft Excel](#) application stands out as an indispensable tool, primarily due to the robustness of its [Pivot Table](#) feature. While these tables are exceptionally adept at summarizing and organizing vast, complex datasets through default [aggregation](#), analysts frequently face situations requiring the combination of data from several existing fields. This comprehensive guide delivers a precise, step-by-step methodology for summing two distinct columns directly within an Excel [Pivot Table](#). By utilizing a powerful feature known as a [Calculated Field](#), you can significantly enhance your analytical capabilities without making any modifications to the underlying [source data](#).

Unlocking Deeper Insights Using Calculated Fields

A fundamental skill in advanced reporting is understanding how to extend and manipulate the inherent functionality of [Pivot Tables](#) to extract more meaningful insights from raw data. In many analytical scenarios, the standard summarizations provided by [Excel](#)--such as simple sums, counts, or averages--may not meet specific reporting requirements. For instance, a user might need a single metric that represents the combined value of two distinct financial metrics, like total revenue plus total commissions, or in our case, sales combined with returns.

This tutorial addresses the common need to sum values derived from two distinct columns already summarized within your existing [Pivot Table](#) structure. Achieving this requires us to employ [Calculated Fields](#), a robust feature allowing the creation of new data fields based on mathematical operations performed on existing fields. This approach is highly advantageous because it ensures the derived data remains dynamic, automatically updating whenever the [Pivot Table](#) is refreshed.

By mastering this technique, you will gain the ability to confidently incorporate custom, complex calculations into your reports, significantly expanding the utility of your Pivot Tables for various demanding [data analysis](#) tasks. We will now proceed with the practical implementation steps.

Step 1: Preparing Your Source Data

The success of any effective analysis using an [Excel](#) Pivot Table hinges on the quality and organization of the underlying [source data](#). Before initiating the Pivot Table creation process, you must ensure your data is meticulously structured in a clean, [tabular format](#), complete with clear, unique headers. This structure is paramount for Excel to correctly interpret the fields and perform accurate aggregation.

For the purposes of this walkthrough, we will use a straightforward dataset that tracks financial metrics--specifically, successful sales and subsequent returns--across three distinct sales teams. This information will form the foundation for our Pivot Table and the custom calculation we intend to implement. Please enter the following data precisely into your Excel worksheet:

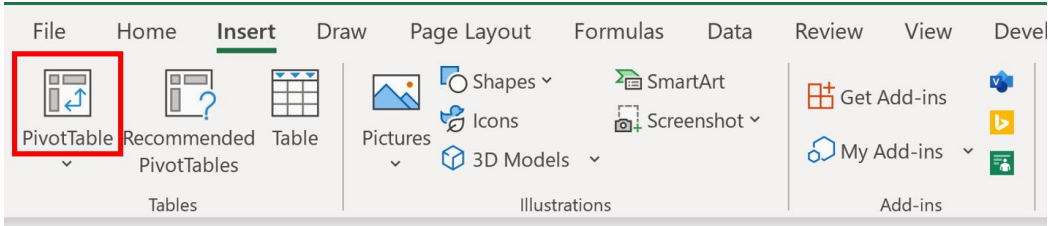
	A	B	C	D	E
1	Team	Sales	Returns		
2	A	10	2		
3	A	7	0		
4	A	7	1		
5	A	8	1		
6	A	6	0		
7	B	10	2		
8	B	14	5		
9	B	13	4		
10	B	9	0		
11	B	5	2		
12	C	12	1		
13	C	10	1		
14	C	10	3		
15	C	12	4		
16	C	9	1		
17					
18					
19					
20					
21					

Observe that each record is classified by **Team**, alongside corresponding numerical values for **Sales** and **Returns**. This consistent, column-based format enables [Excel](#) to seamlessly identify and aggregate the data points based on the selected criteria.

Step 2: Constructing Your Basic Pivot Table

With the source data validated and prepared, the essential next phase is to construct the initial [Pivot Table](#) framework. This base structure will serve as the canvas upon which we layer our custom calculations.

To begin the creation process, ensure any cell within your defined data range (e.g., cell A1) is selected. Navigate to the **Insert** tab positioned in the upper ribbon of the Excel interface, and then click the designated **PivotTable** icon.



The "Create PivotTable" dialog box will prompt you to define two critical parameters: the data range and the placement of the new table. Confirm that the selected data source encompasses the entire dataset--in this example, **A1:C16**. For placement, selecting an existing worksheet location, such as cell **E1**, is often most practical. Finalize these selections by clicking **OK**.

	A	B	C	D	E	F	G
1	Team	Sales	Returns				
2	A	10	2				
3	A	7	0				
4	A	7	1				
5	A	8	1				
6	A	6	0				
7	B	10	2				
8	B	14	5				
9	B	13	4				
10	B	9	0				
11	B	5	2				
12	C	12	1				
13	C	10	1				
14	C	10	3				
15	C	12	4				
16	C	9	1				
17							
18							
19							
20							
21							

PivotTable from table or range

Select a table or range

Table/Range: Sheet1!\$A\$1:\$C\$16

Choose where you want the PivotTable to be placed

New Worksheet

Existing Worksheet

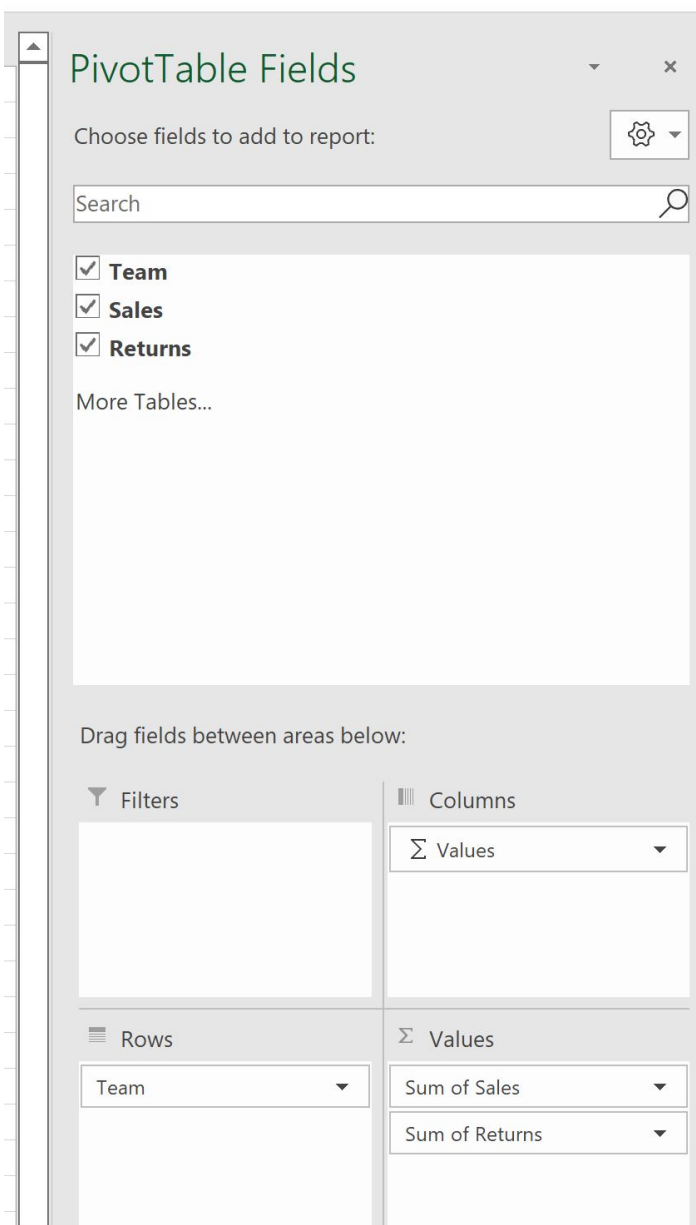
Location: Sheet1!\$E\$1

Choose whether you want to analyze multiple tables

Add this data to the Data Model

OK Cancel

Once the table is initialized, the crucial **PivotTable Fields panel** will appear on the right side of the screen. This interactive panel is utilized to drag and drop fields, thus defining the structure and the values to be summarized. Drag the **Team** field into the **Rows** area to categorize the data by sales team. Subsequently, drag both the **Sales** and **Returns** fields into the **Values** area. [Excel](#) automatically applies the Sum function to these numerical fields by default.



At this point, your Pivot Table provides an initial summary, displaying the sum of sales and the sum of returns aggregated for each respective team.

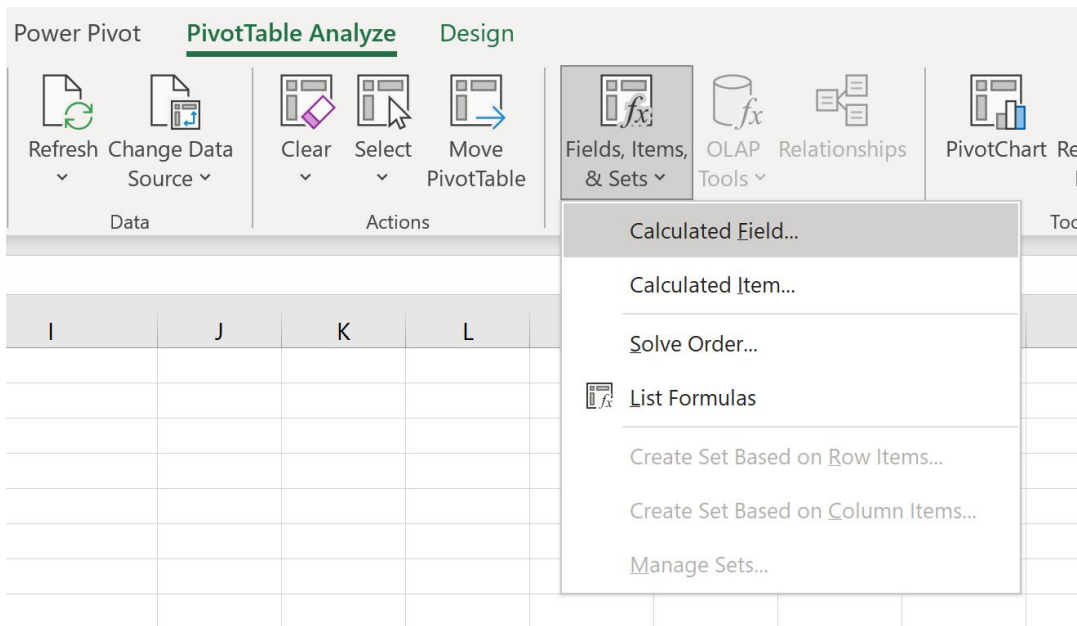
D	E	F	G
	Row Labels	Sum of Sales	Sum of Returns
	A	38	4
	B	51	13
	C	53	10
	Grand Total	142	27

Step 3: Implementing a Calculated Field for Column Summation

The core objective of this guide is accomplished in this step: adding a custom metric that sums the already aggregated "Sum of Sales" and "Sum of Returns" columns. This essential calculation is executed through the creation of a [Calculated Field](#).

A [Calculated Field](#) enables users to define custom mathematical or logical operations using the fields available in the source data. The results of this formula are then presented as a new field within the Pivot Table, effectively creating derived metrics without altering the original data structure.

To activate this feature, ensure you have clicked on any cell within your Pivot Table. This action makes the contextual ribbon tabs visible. Navigate to the **PivotTable Analyze** tab, locate the **Fields, Items & Sets** group, and select **Calculated Field** from the subsequent dropdown menu.



The "Insert Calculated Field" window requires the definition of the new metric. In the **Name** input box, enter a descriptive title, such as "Total Transactions." This name will be used as the column header in the resulting table. In the **Formula** box, input the simple arithmetic operation: **= Sales + Returns**. It is crucial to verify that the field names "Sales" and "Returns" are typed identically to their representation in the source data. After verification, click **Add**, and then confirm by clicking **OK**.

E	F	G	H	I	J
Row Labels	Sum of Sales	Sum of Returns			
A	38	4			
B	51	13			
C	53	10			
Grand Total	142	27			

Insert Calculated Field

Name: Total Transactions

Formula: =Sales + Returns

Fields:

- Team
- Sales
- Returns

Insert Field

OK Close

Step 4: Verifying and Utilizing Your Enhanced Pivot Table

The moment the [Calculated Field](#) is confirmed, it is automatically integrated into the **Values** area of your Pivot Table. You will immediately observe a new column labeled "Sum of Total Transactions" appended next to the original "Sum of Sales" and "Sum of Returns" columns.

resource allocation. Implementing custom calculations ensures your reports are not only dynamic but also highly informative, transforming basic summaries into comprehensive analytical tools.

We encourage you to experiment with other arithmetic and logical operations within the Calculated Field feature to further tailor your reports to complex business requirements.

Additional Excel Resources

For analysts and professionals seeking to expand their proficiency in Microsoft Excel, the following related tutorials explore other common tasks and advanced functionalities that complement Pivot Table expertise:

[How to Create a Dashboard in Excel](#)

[How to Group by Month in a Pivot Table in Excel](#)

[How to Sort by Grand Total in a Pivot Table in Excel](#)