

CHEAT SHEET: EXCEL WATERFALL CHARTS

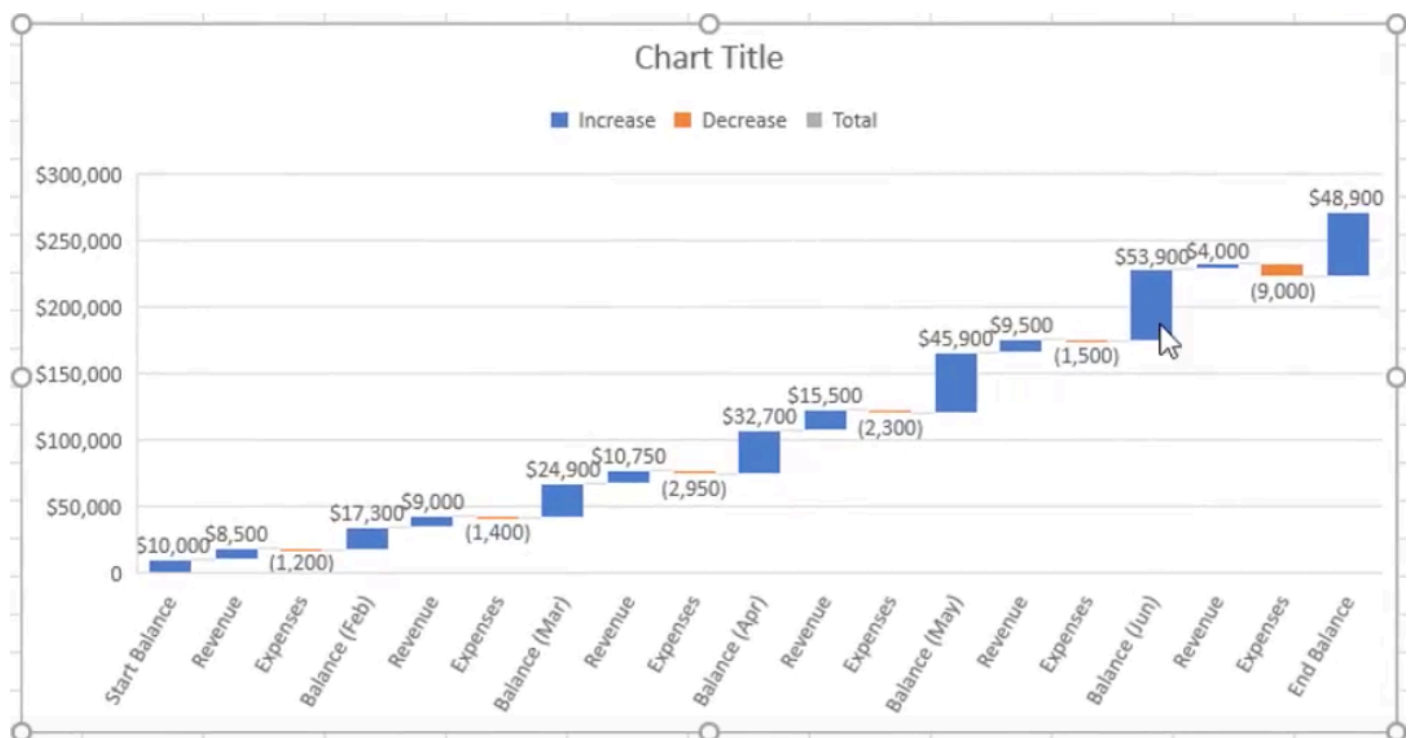
How to create a Waterfall Chart

Set the data up like the sample shown. It requires a starting value then a series of cumulative balances, as shown in green in cells A4, A7, A10 etc. Inbetween each balance there should be one or more positive and/or negative values which represent the activity between each balance point.

1. Select a single cell on the range or select the entire range.
2. Click the **Insert** tab.
3. Click the **Waterfall** icon in the **Charts** group. Alternatively, click **Recommended Charts** | **All Charts** tab | **Waterfall**.

	A	B
1	Start Balance	\$10,000
2	Revenue	\$8,500
3	Expenses	(1,200)
4	Balance (Feb)	\$17,300
5	Revenue	\$9,000
6	Expenses	(1,400)
7	Balance (Mar)	\$24,900
8	Revenue	\$10,750
9	Expenses	(2,950)
10	Balance (Apr)	\$32,700
11	Revenue	\$15,500
12	Expenses	(2,300)
13	Balance (May)	\$45,900
14	Revenue	\$9,500
15	Expenses	(1,500)
16	Balance (Jun)	\$53,900
17	Revenue	\$4,000
18	Expenses	(9,000)
19	End Balance	\$48,900

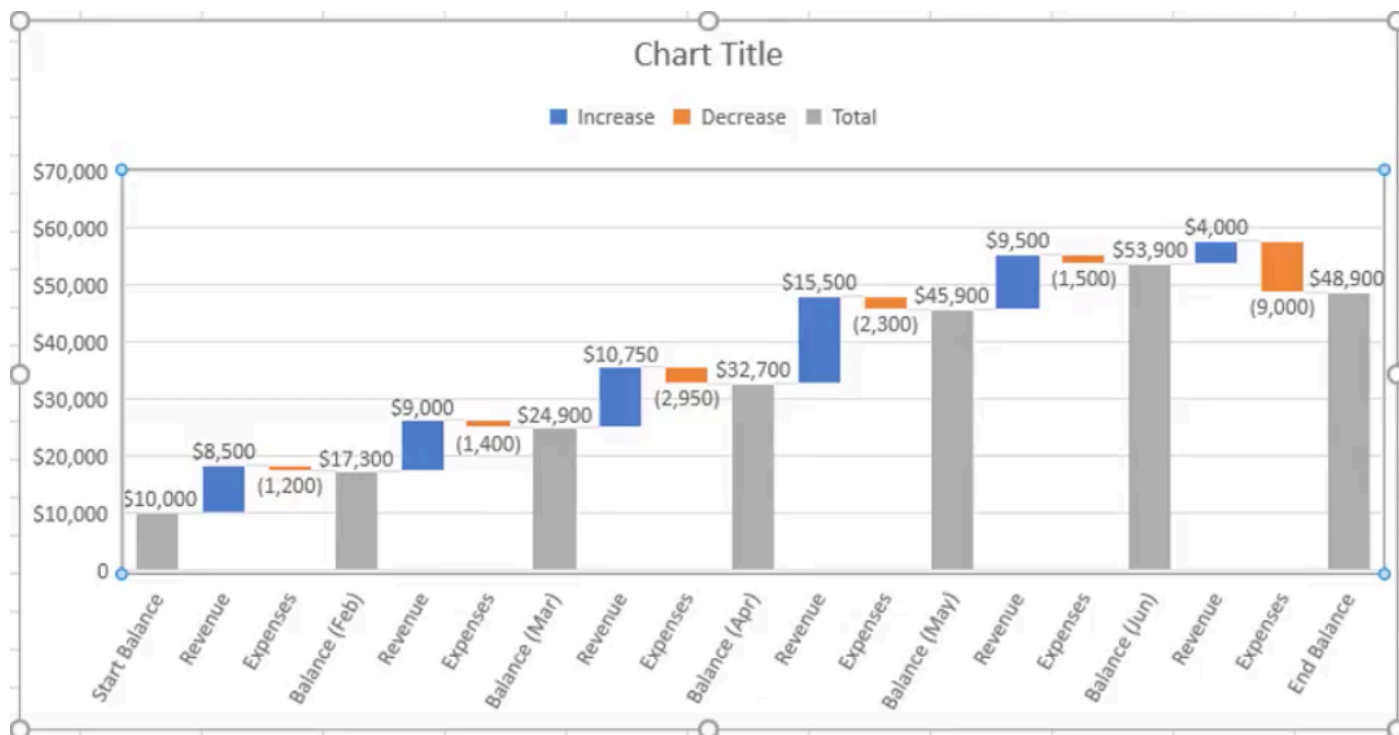
Your chart will look similar to this:



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4. Right click the last total and choose Set As Total. This resets it back to zero (the base line)
5. Working right-to-left, repeat the previous step for each total on the chart.

Your chart will now look similar to this. The grey bars are the cumulative totals. The blue and orange bars in between are the positive and negative events that happened in between.



Change the chart colours

1. Select the **Design** tab under **Chart Tools**.
2. Click **Change Colors**. This shows you all the different colour themes available.
3. Select the **Page Layout** tab.
4. Click the **Colors** button in the **Themes** group.
5. Click **Customize Colors** at the bottom.
6. Accent 1, Accent 2 and Accent 3 are the most important as these correspond to the three main colours on the Waterfall chart.
7. Set your colours, type a name for your custom theme and click OK.