# EKATU Connecting People With Technology

<u>Technology Workshop</u>: Microsoft Excel Tips & Tricks!

> July 30, 2015 Lunch & Learn Webinar





Partner

Microsoft<sub>\*</sub> Small Business Specialist



#### Welcome!

- Thank you for joining us today.
- In today's call we'll talk about Microsoft Excel Tips and Tricks. The call will last approximately 20 minutes
- To follow from your office, go to <u>www.ekaru.com</u> / Go to "What's New" near the bottom of the page. Presentation will open in a browser, click the down arrow in nav bar to advance slides.







#### Format

#### This is a "listen only" voice call.

- (For call clarity, cut down on ambient noise, avoid "call on hold music" – a bit tough though, because I can't hear you!)
- If you have questions, please eMail to info@ekaru.com and we will try to include Q&A at the end of the call – we will be reviewing email live during the call.
- Call 978-692-4200 for help.







- Help you get more from the technology you already have.
- Introduce you to new technologies you need to know about.









#### Overview

#### 17 Excel Tips and Tricks:

- Most examples will be basic.
- We'll show a few favorite tricks
- Try to get one new trick you can use!

#### Ask Questions: info@ekaru.com







#### Topics

- Formatting Cells
- Basic Formulas
- Format as Table
- Insert Spreadsheet into Word
- Graphs
- Export from QuickBooks
- Keyboard Shortcuts









# Present Data"Crunch" Numbers (Do math)







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# Sample Spreadsheet

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#### Tip #1: Formatting Cells - Font

Highlight CellsSelect Fonts

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### Tip #2: Formatting Cells - Options

#### Right click to format/ "Format Cells":



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#### Tip #3: Auto-Size Columns

Double-click between cells to auto-size

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## Tip #4: Types of Data

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# Tip #5: Formula: SUM

SUM(C2:C14)

Provides the total for a range of rows

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# Tip #6: SUM (Specific Cells)

#### Click on individual cells...

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#### Tip #7: Formula: AVERAGE

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# Tip #8: Formulas: SUMIF

- Adds a range of numbers based on a condition.
- SUMIF(A2:A14, "Monday", C2:C14)

#### 1 2 3

- Range to Evaluate Check these cells to see if they meet your criteria
- Criteria The condition that must be met for the row to be included in the sum
- **3. Range to Sum** Add these numbers in this column where the row meets the criteria



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# Formula: SUMIF

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#### Tip#9: More Formulas

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# Tip #10: "Format as Table"

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# Turn off "Format as Table"

- What if you want to revert back to a regular spreadsheet?
- Consider two factors:
  - Format
  - Sort
- Turn off Sort
- Turn off formatting







# Turn off "Format as Table"

#### Turn off Formatting:

- Highlight the area and select "Clear" / "Clear Formats" (Home Tab)
- Turn off Filtering:
   Highlight the area, go to the "Data" Tab and click "Filter"







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#### Tip #12: Excel – Insert Spreadsheet into Word

- Spreadsheet looks like a table
- You can keep doing "math" because its still a spreadsheet
- In WORD, "Insert" tab, choose "Object"





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#### Excel – Insert Spreadsheet into Word

#### Create a new file, or select an existing Excel file.

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# Excel in Word:



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#### Fully functional Excel spreadsheet embedded in Microsoft Word

Here are the latest sales figures for the week:

Day	Sales Person	🔺 Invoice 📑
Monday	Hazel	22500
Thursday	Hazel	5600
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# Tip #13: Creating Graphs

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# Tip #14: Zoom In / Zoom Out



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### Tip #15: Conditional Formatting

#### Highlight data that meets criteria

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# **Conditional Formatting**

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#### Tip #16: Freeze Panes

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### Tip #17: Excel from Quickbooks

#### Any report in Quickbooks can be exported to Excel

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- Choose some data that is useful for running your business.
- Develop a spreadsheet
- Start testing various "tricks"
- Create a "Business Dashboard"





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- We love to hear from you! Send us questions/topics for future blog posts or webinars.
- If there are any questions that didn't get answered today, email us at <u>info@ekaru.com</u> or call us at 978-692-4200.



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#### Thank You!:

#### For more information:



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