# Ekaru Connecting People With Technology

Technology Workshop:
Microsoft Excel
Tips & Tricks!

July 30, 2015
Lunch & Learn Webinar

Microsoft Small Business Specialist

*Microsoft* CERTIFIED Partner

# 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 [www.ekaru.com](http://www.ekaru.com) / 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.

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# Workshop Mission

- 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

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# Excel

- Present Data
- "Crunch" Numbers (Do math)

# Sample Spreadsheet

# Tip #1: Formatting Cells - Font

- Highlight Cells
- Select Fonts

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# Tip #2: Formatting Cells - Options

- Right click to format/ "Format Cells":

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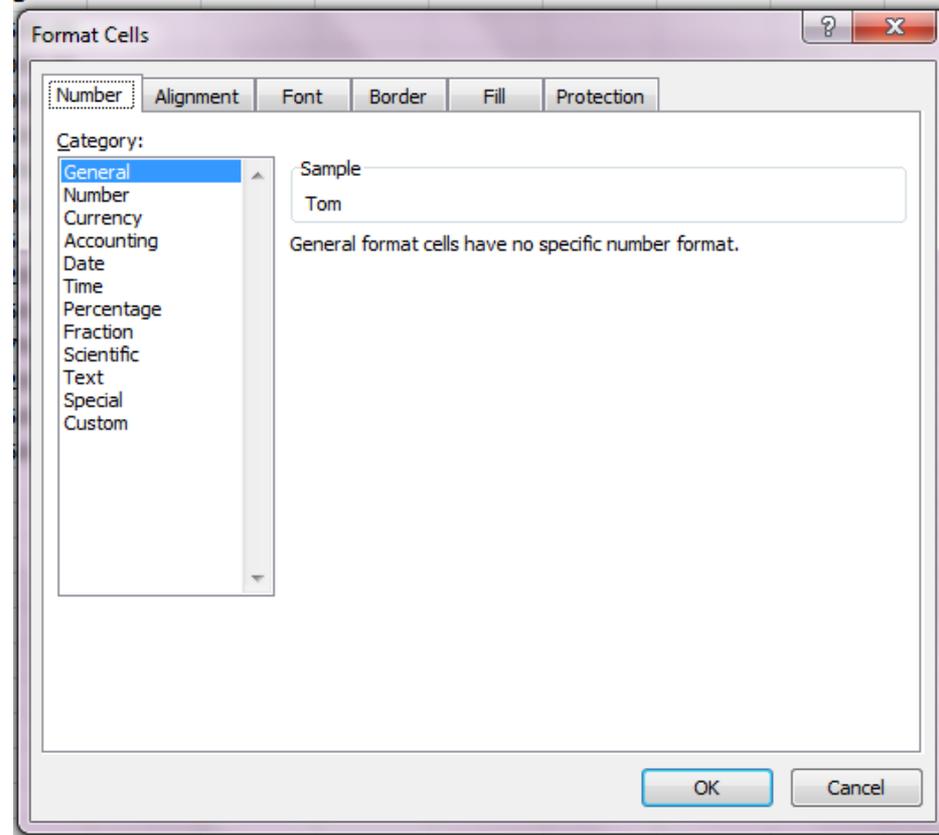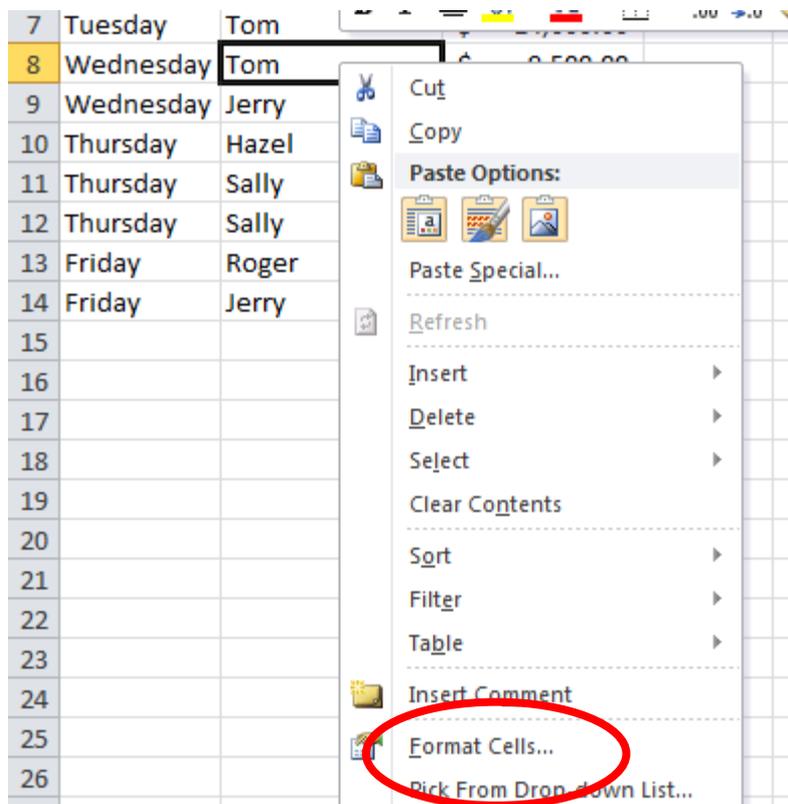
# Tip #3: Auto-Size Columns

- Double-click between cells to auto-size

# Tip #4: Types of Data

# 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…

# Tip #7: Formula: AVERAGE

# Tip #8: Formulas:  SUMIF

- Adds a range of numbers based on a condition.

- =SUMIF(A2:A14, "Monday", C2:C14)

  **1**          **2**          **3**

1. **Range to Evaluate** – Check these cells to see if they meet your criteria
2. **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

# Formula: SUMIF



Sales for Monday

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# Formula: SumIf



Sales for Sally

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# Tip#9: More Formulas

■ Check out the "Formulas" Tab:

# Tip #10: "Format as Table"

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# "Format as Table"

# "Format as Table"

# "Format as Table"

# "Format as Table"

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# "Format as Table"



**Sort from A to Z**

# "Format as Table"

| Day | Sales Person | Invoice |
|---|---|---|

Sort A to Z — 22500
Sort Z to A — 5600
Sort by Color — 13000
— 8200
Clear Filter From "Sales Person" — 8600
Filter by Color — 7500
Text Filters — 4500

Search — 19000

☐ (Select All) — 8000
☑ Hazel — 18700
☐ Jerry — 9200
☐ Roger — 14000
☐ Sally — 9500
☐ Tom

OK    Cancel
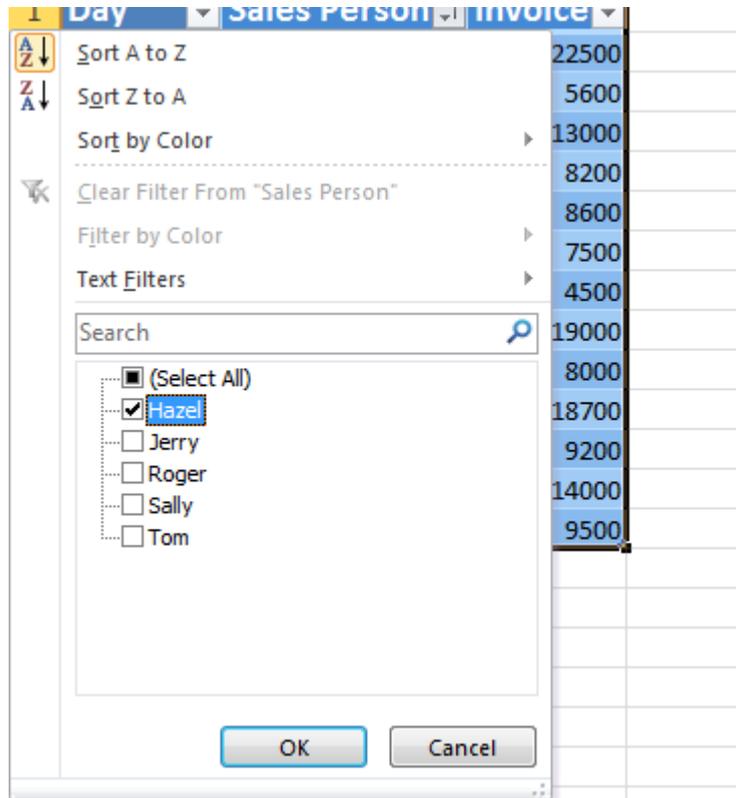
**Filter for one name**

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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)
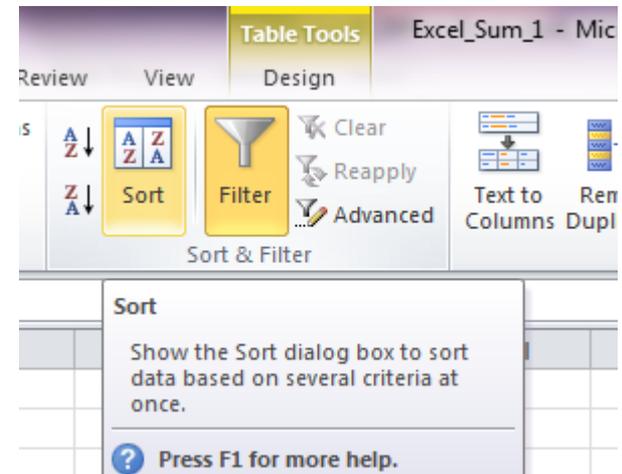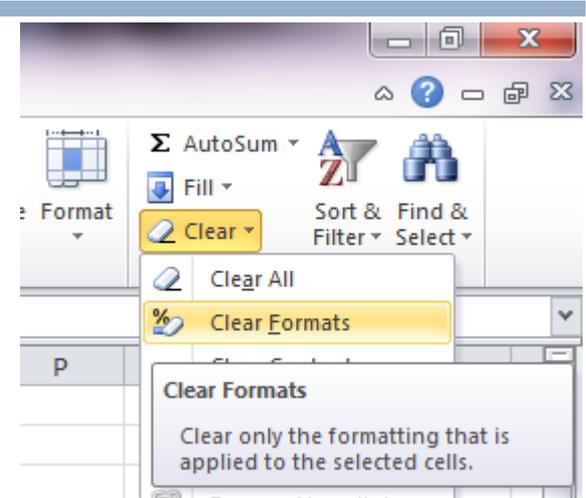
- ## Turn off Filtering:
  - ### Highlight the area, go to the "Data" Tab and click "Filter"

# 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"
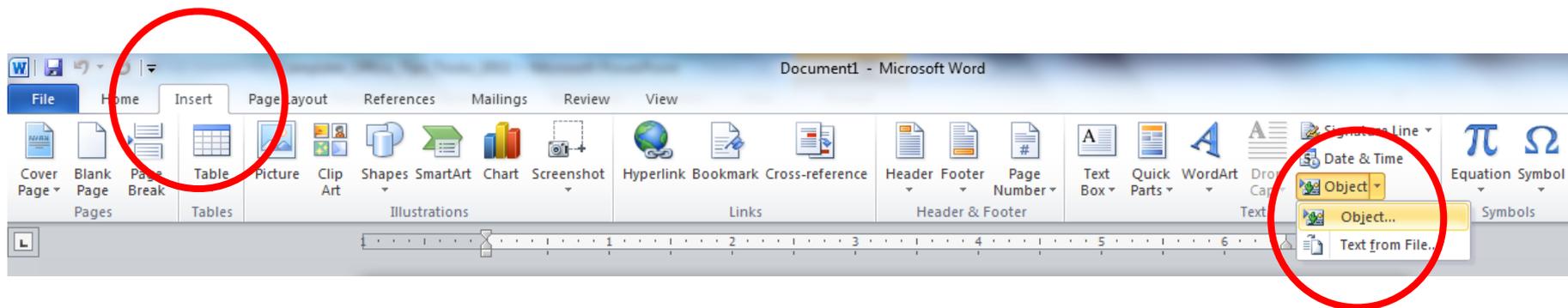
# Excel – Insert Spreadsheet into Word

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

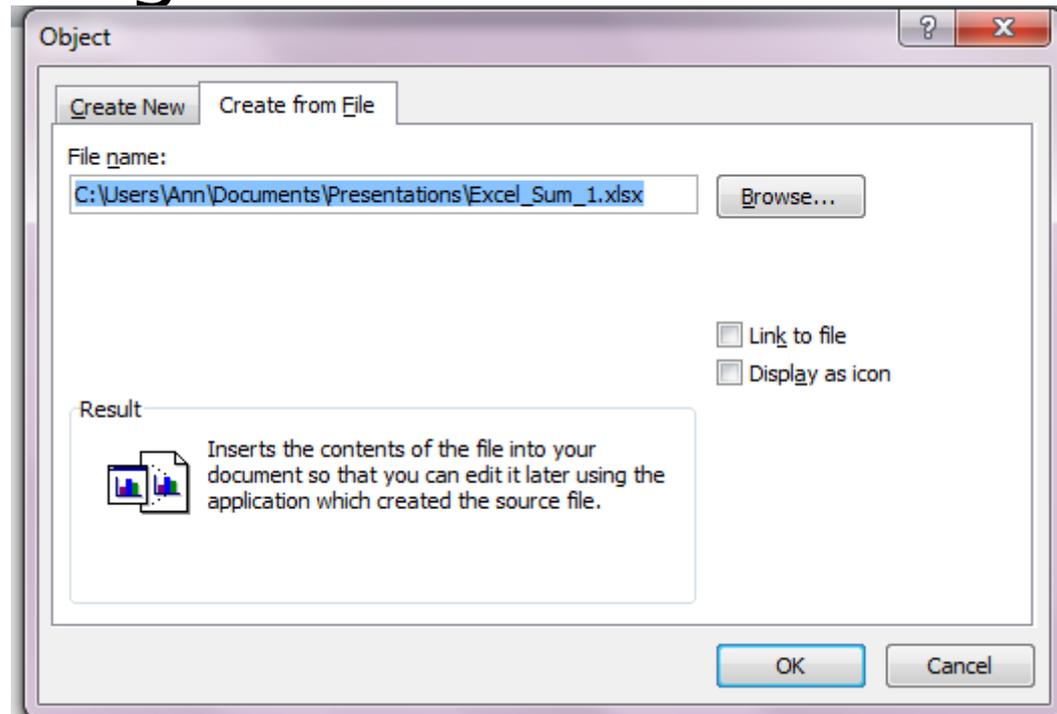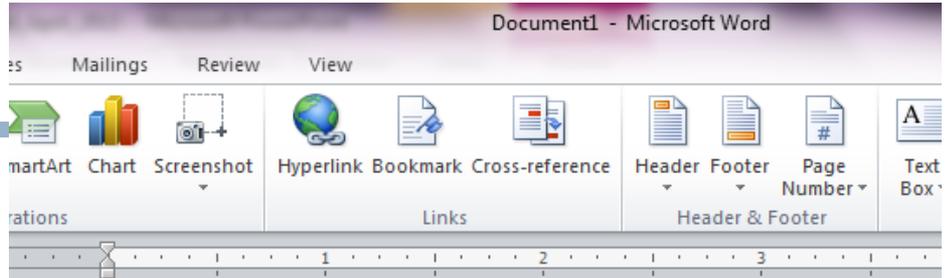# Excel in Word:

**Fully functional Excel spreadsheet embedded in Microsoft Word**
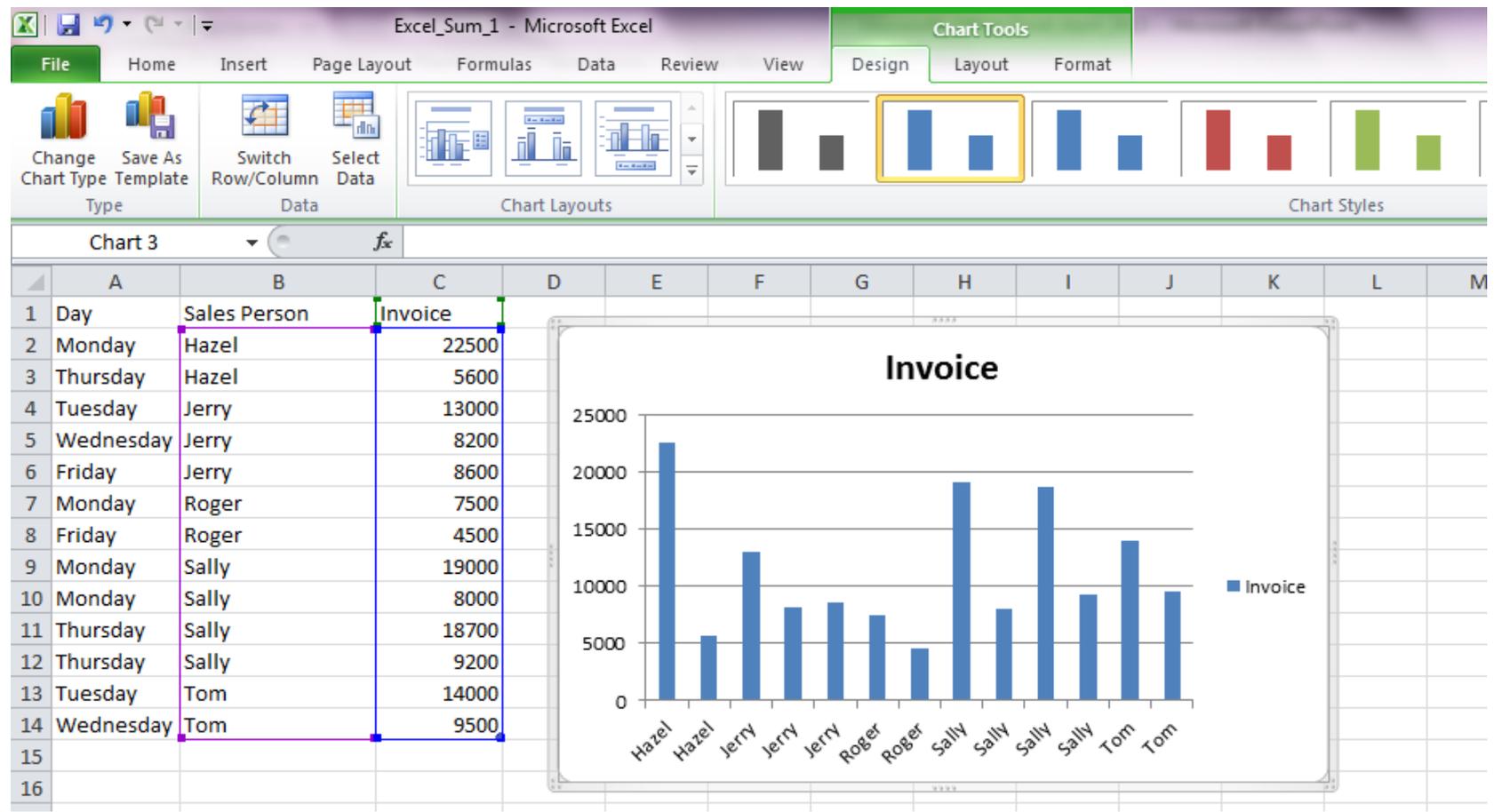
Document1 - Microsoft Word

es    Mailings    Review    View

martArt  Chart  Screenshot    Hyperlink  Bookmark  Cross-reference    Header  Footer  Page Number    Text Box

rations    Links    Header & Footer

Here are the latest sales figures for the week:

| Day | Sales Person | Invoice |
|---|---|---|
| Monday | Hazel | 22500 |
| Thursday | Hazel | 5600 |
| Tuesday | Jerry | 13000 |
| Wednesday | Jerry | 8200 |
| Friday | Jerry | 8600 |
| Monday | Roger | 7500 |
| Friday | Roger | 4500 |
| Monday | Sally | 19000 |
| Monday | Sally | 8000 |
| Thursday | Sally | 18700 |
| Thursday | Sally | 9200 |
| Tuesday | Tom | 14000 |
| Wednesday | Tom | 9500 |

# Tip #13: Creating Graphs

# Graph

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# Tip #14: Zoom In / Zoom Out

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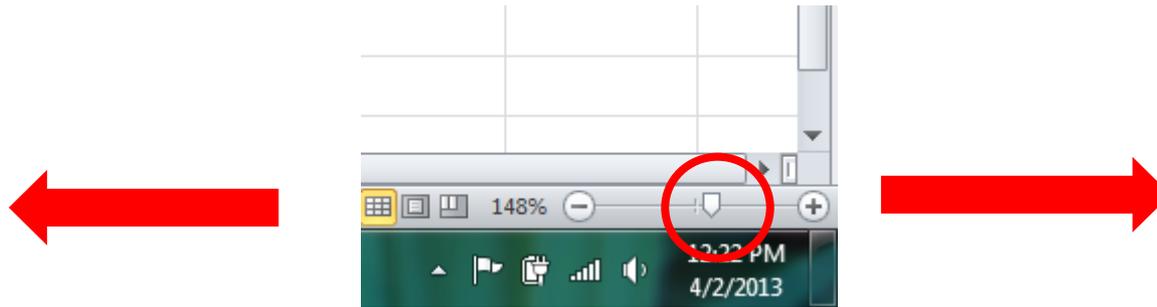
# Tip #15: Conditional Formatting

- Highlight data that meets criteria

# Conditional Formatting

# Tip #16: Freeze Panes

# Tip #17: Excel from Quickbooks

- Any report in Quickbooks can be exported to Excel

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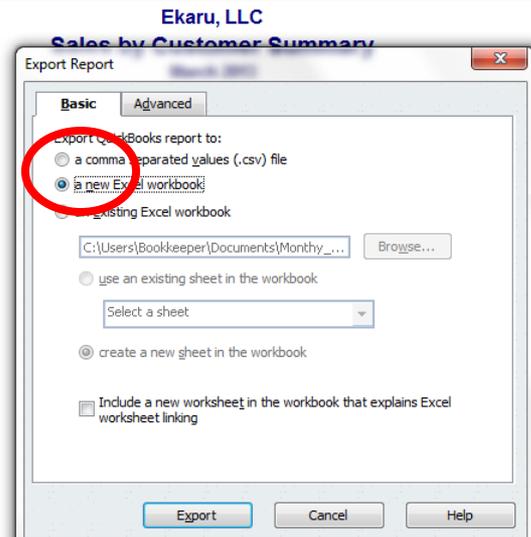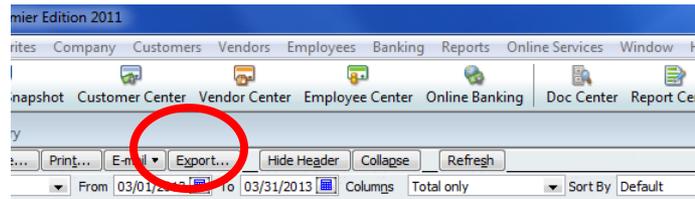
# Next Steps…

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

# More Questions?

- 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 info@ekaru.com or call us at 978-692-4200.

# Thank You!:

For more information:

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