Excel Copilot Mastery

Quick Reference Prompt Cards

Essential prompts for getting the most out of Excel Copilot

Data Analysis Prompts

Calculate the total:

Calculate the total [metric] from [sheet/range] where [condition]

Find the average:

Find the average [metric] by [category] from [data range]

Identify trends:

Show me the trend of [metric] over [time period] in [data]

Compare values:

Compare [metric A] vs [metric B] across [dimension]

Find outliers:

Identify values in [column] that are more than [X]% above/below average

Summarize data:

Create a summary showing [metrics] grouped by [category]

Formula Creation Prompts

Conditional sum:

Create a formula to sum [column] where [condition]

Lookup value:

Write a formula to look up [value] from [table] based on [key]

Text manipulation:

Extract [part] from text in [column] (e.g., first 3 characters)

Date calculations:

Calculate the number of [days/months] between [date1] and [date2]

Nested IF:

Create a formula: if [condition1] then [result1], else if [condition2] then [result2], else [result3]

Dynamic ranges:

Create a formula that automatically adjusts when rows are added to [range]

Data Transformation Prompts

Split columns:

Split [column] into separate columns at [delimiter]

Merge data:

Combine data from [sheet1] and [sheet2] based on [common column]

Remove duplicates:

Identify and highlight duplicate values in [column]

Format data:

Convert [column] to [format] (e.g., proper case, currency, date)

Pivot data:

Restructure data from [range] with [rows], [columns], and [values]

Filter data:

Extract all rows from [range] where [condition]

Visualization Prompts

Create chart:

Create a [chart type] showing [metric] by [category] from [data]

Trend line:

Add a trend line to show the [direction] of [metric] over time

Comparison chart:

Create a chart comparing [metric A] and [metric B] across [dimension]

Dashboard:

Create a visual dashboard summarizing key metrics from [data source]

Conditional formatting:

Highlight cells in [range] where [condition] using [color scheme]

Sparklines:

Add sparklines to show mini trends for each [row/item] in [column]

Best Practices for Effective Prompts

1. Be Specific: Mention exact sheet names, column headers, and ranges

2. Provide Context: Include relevant business logic or calculation methods

3. Show Examples: Give sample input and expected output when possible

4. Start Simple: Break complex tasks into smaller, sequential prompts

5. Reference by Name: Use named ranges and tables for clearer prompts

6. Verify Results: Always check Copilot's output for accuracy

7. Iterate: Refine your prompts based on initial results

8. Save Successful Prompts: Keep a library of prompts that work well

For more prompts and examples, see Excel Copilot Mastery
Visit https://voxforgehq.github.io/excel-copilot-demo-pack