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EXCEL TIPS, TRICKS AND SHORTCUTS

What is Excel?

Microsoft Excel is powerful data visualization and analysis software, which uses spreadsheets to store, organize, and track data sets with formulas and functions. Excel is used by marketers, accountants, data analysts, and other professionals. It's part of the Microsoft Office suite of products. Alternatives include Google Sheets and Numbers.

Excel is used to store, analyze, and report large amounts of data. It is often used by accounting teams for financial analysis but can be used by any professional to manage long and unwieldy datasets. Examples of Excel applications include balance sheets, budgets, and editorial calendars.

Excel is primarily used for creating financial documents because of its strong computational powers. You'll often find the software in accounting offices and teams because it allows accountants to automatically see sums, averages, and totals. With Excel, they can easily make sense of their business data.

While Excel is primarily known as an accounting tool, professionals in any field can use its features and formulas — especially marketers — because it can be used for tracking any type of data. It removes the need to spend hours and hours counting cells or copying and pasting performance numbers. Excel typically has a shortcut or quick fix that speeds up the process.

Excel Basics

If you're just starting with Excel, there are a few basic commands that we suggest you become familiar with. These are things like:

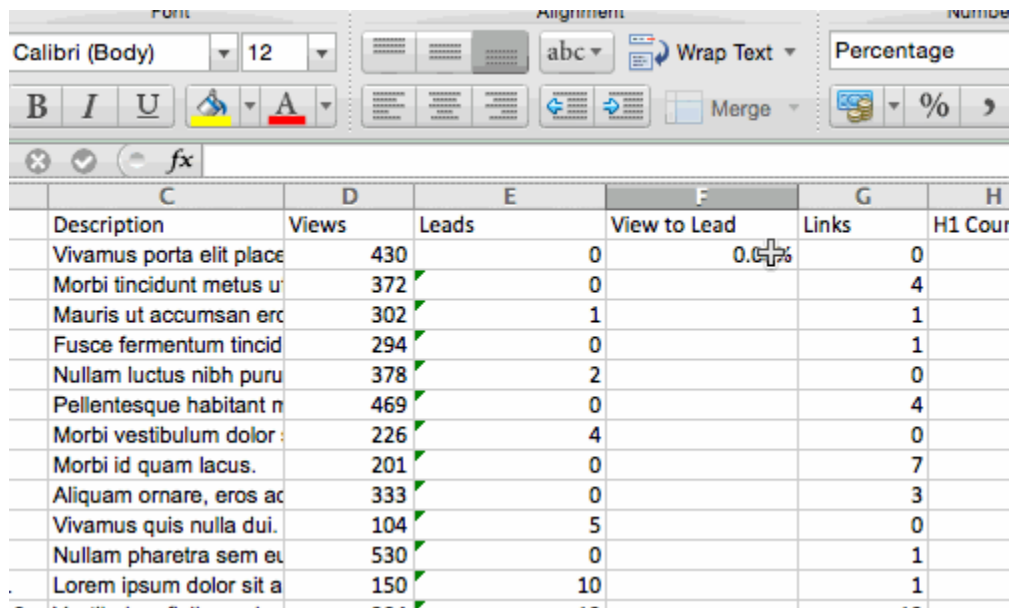
- Creating a new spreadsheet from scratch.
- Executing basic computations like adding, subtracting, multiplying, and dividing.
- Writing and formatting column text and titles.
- Using Excel's auto-fill features.
- Adding or deleting single columns, rows, and spreadsheets. (Below, we'll get into how to add things like multiple columns and rows.)
- Keeping column and row titles visible as you scroll past them in a spreadsheet, so that you know what data you're filling as you move further down the document.
- Sorting your data in alphabetical order.

Let's explore a few of these more in-depth.

For instance, why does auto-fill matter?

If you have any basic Excel knowledge, it's likely you already know this quick trick. But to cover our bases, allow me to show you the glory of autofill. This lets you quickly fill adjacent cells with several types of data, including values, series, and formulas.

There are multiple ways to deploy this feature, but the fill handle is among the easiest. Select the cells you want to be the source, locate the fill handle in the lower-right corner of the cell, and either drag the fill handle to cover cells you want to fill or just double click:



	C	D	E	F	G	H
	Description	Views	Leads	View to Lead	Links	H1 Cour
	Vivamus porta elit place	430	0	=D5/E5	0	
	Morbi tincidunt metus u	372	0		4	
	Mauris ut accumsan erc	302	1		1	
	Fusce fermentum tincid	294	0		1	
	Nullam luctus nibh puru	378	2		0	
	Pellentesque habitant n	469	0		4	
	Morbi vestibulum dolor	226	4		0	
	Morbi id quam lacus.	201	0		7	
	Aliquam ornare, eros ac	333	0		3	
	Vivamus quis nulla dui.	104	5		0	
	Nullam pharetra sem eu	530	0		1	
	Lorem ipsum dolor sit a	150	10		1	

excel autofill Similarly, sorting is an important feature you'll want to know when organizing your data in Excel.

Sometimes you may have a list of data that has no organization whatsoever. Maybe you exported a list of your marketing contacts or blog posts. Whatever the case may be, Excel's sort feature will help you alphabetize any list.

Click on the data in the column you want to sort. Then click on the "Data" tab in your toolbar and look for the "Sort" option on the left. If the "A" is on top of the "Z," you can just click on that button once. If the "Z" is on top of the "A," click on the button twice. When the "A" is on top of the "Z," that means your list will be sorted in alphabetical order. However, when the "Z" is on top of the "A," that means your list will be sorted in reverse alphabetical order.

Let's explore more of the basics of Excel (along with advanced features) next.

How to Use Excel

To use Excel, you only need to input the data into the rows and columns. And then you'll use formulas and functions to turn that data into insights.

We're going to go over the best formulas and functions you need to know. But first, let's take a look at the types of documents you can create using the software. That way, you have an overarching understanding of how you can use Excel in your day-to-day.

Documents You Can Create in Excel

Not sure how you can use Excel in your team? Here is a list of documents you can create:

- **Income Statements:** You can use an Excel spreadsheet to track a company's sales activity and financial health.
- **Balance Sheets:** Balance sheets are among the most common types of documents you can create with Excel. It allows you to get a holistic view of a company's financial standing.
- **Calendar:** You can easily create a spreadsheet monthly calendar to track events or other date-sensitive information.

Here are some documents you can create specifically for marketers.

- **Marketing Budgets:** Excel is a strong budget-keeping tool. You can create and track marketing budgets, as well as spending, using Excel. If you don't want to create a document from scratch.
- **Marketing Reports:** If you don't use a marketing tool such as Marketing Hub, you might find yourself in need of a dashboard with all of your reports. Excel is an excellent tool to create marketing reports.
- **Editorial Calendars:** You can create editorial calendars in Excel. The tab format makes it extremely easy to track your content creation efforts for custom time ranges.
- **Traffic and Leads Calculator:** Because of its strong computational powers, Excel is an excellent tool to create all sorts of calculators — including one for tracking leads and traffic.

This is only a small sampling of the types of marketing and business documents you can create in Excel. We've created an extensive list of Excel templates you can use right now for marketing, invoicing, project management, budgeting, and more.

In the spirit of working more efficiently and avoiding tedious, manual work, here are a few Excel formulas and functions you'll need to know.

Excel Formulas

It's easy to get overwhelmed by the wide range of Excel formulas that you can use to make sense of your data. If you're just getting started using Excel, you can rely on the following formulas to carry out some complex functions — without adding to the complexity of your learning path.

- **Equal sign:** Before creating any formula, you'll need to write an equal sign (=) in the cell where you want the result to appear.
- **Addition:** To add the values of two or more cells, use the + sign. Example: =C5+D3.
- **Subtraction:** To subtract the values of two or more cells, use the - sign. Example: =C5-D3.
- **Multiplication:** To multiply the values of two or more cells, use the * sign. Example: =C5*D3.
- **Division:** To divide the values of two or more cells, use the / sign. Example: =C5/D3.

Putting all of these together, you can create a formula that adds, subtracts, multiplies, and divides all in one cell. Example: =(C5-D3)/((A5+B6)*3).

For more complex formulas, you'll need to use parentheses around the expressions to avoid accidentally using the PEMDAS order of operations. Keep in mind that you can use plain numbers in your formulas.

Excel Functions

Excel functions automate some of the tasks you would use in a typical formula. For instance, instead of using the + sign to add up a range of cells, you'd use the SUM function. Let's look at a few more functions that will help automate calculations and tasks.

- **SUM:** The SUM function automatically adds up a range of cells or numbers. To complete a sum, you would input the starting cell and the final cell with a colon in between. Here's what that looks like SUM(Cell1:Cell2). Example: =SUM(C5:C30).
- **AVERAGE:** The AVERAGE function averages out the values of a range of cells. The syntax is the same as the SUM function: AVERAGE(Cell1:Cell2). Example: =AVERAGE(C5:C30).
- **IF:** The IF function allows you to return values based on a logical test. The syntax is as follows: IF(logical_test, value_if_true, [value_if_false]). Example: =IF(A2>B2,"Over Budget","OK").
- **VLOOKUP:** The VLOOKUP function helps you search for anything on your sheet's rows. The syntax is VLOOKUP(lookup value, table array, column number, Approximate match (TRUE), or Exact match (FALSE)). Example: =VLOOKUP([@Attorney],tbl_Attorneys,4,FALSE).
- **INDEX:** The INDEX function returns a value from within a range. The syntax is as follows: INDEX(array, row_num, [column_num]).
- **MATCH:** The MATCH function looks for a certain item in a range of cells and returns the position of that item. It can be used in tandem with the INDEX function. The syntax is: MATCH(lookup_value, lookup_array, [match_type]).
- **COUNTIF:** The COUNTIF function returns the number of cells that meet certain criteria or have a certain value. The syntax is COUNTIF(range, criteria). Example: =COUNTIF(A2:A5,"London").

Excel Tips

Use Pivot tables to recognize and make sense of data.

Pivot tables are used to reorganize data in a spreadsheet. They won't change the data that you have, but they can sum up values and compare different information in your spreadsheet, depending on what you'd like them to do.

Let's take a look at an example. Let's say I want to take a look at how many people are in each house at Hogwarts. You may be thinking that I don't have too much data, but for longer data sets, this will come in handy.

To create the Pivot Table, I go to Data > Pivot Table. If you're using the most recent version of Excel, you'd go to Insert > Pivot Table. Excel will automatically populate your Pivot Table, but you can always change around the order of the data. Then, you have four options to choose from.

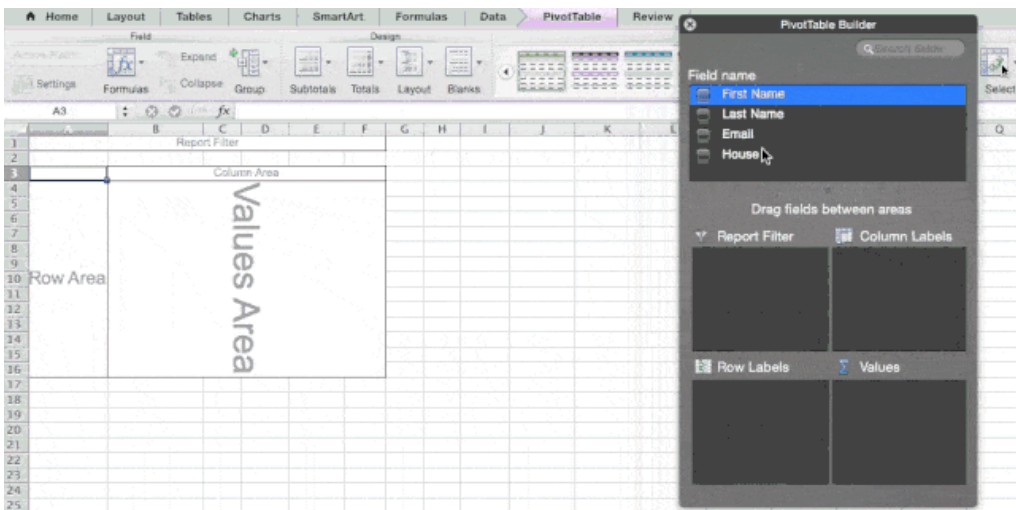
Report Filter: This allows you to only look at certain rows in your dataset. For example, if I wanted to create a filter by house, I could choose to only include students in Gryffindor instead of all students.

Column Labels: These would be your headers in the dataset.

Row Labels: These could be your rows in the dataset. Both Row and Column labels can contain data from your columns (e.g. First Name can be dragged to either the Row or Column label — it just depends on how you want to see the data.)

Value: This section allows you to look at your data differently. Instead of just pulling in any numeric value, you can sum, count, average, max, min, count numbers, or do a few other manipulations with your data. In fact, by default, when you drag a field to Value, it always does a count.

Since I want to count the number of students in each house, I'll go to the Pivot table builder and drag the House column to both the Row Labels and the Values. This will sum up the number of students associated with each house.



Add more than one row or column.

As you play around with your data, you might find you're constantly needing to add more rows and columns. Sometimes, you may even need to add hundreds of rows. Doing this one-by-one would be super tedious. Luckily, there's always an easier way.

To add multiple rows or columns in a spreadsheet, highlight the same number of preexisting rows or columns that you want to add. Then, right-click and select "Insert."

In the example below, I want to add three rows. By highlighting three rows and then clicking insert, I'm able to add three blank rows into my spreadsheet quickly and easily.

	A	B	C	D	E
1	First Name	Last Name	Email	House	
2	Harry	Potter	hpotter@hogwarts.edu	Gryffindor	
3	Hermione	Granger	hgranger@hogwarts.edu	Gryffindor	
4			rweasley@hogwarts.edu	Gryffindor	
5			dmalfoy@hogwarts.edu	Slytherin	
6			cchang@hogwarts.edu	Ravenclaw	
7			llovegood@hogwarts.edu	Ravenclaw	
8			ntonks@hogwarts.edu	Hufflepuff	
9			habbott@hogwarts.edu	Hufflepuff	
10					
11					
12					
13					
14					

Use filters to simplify your data.

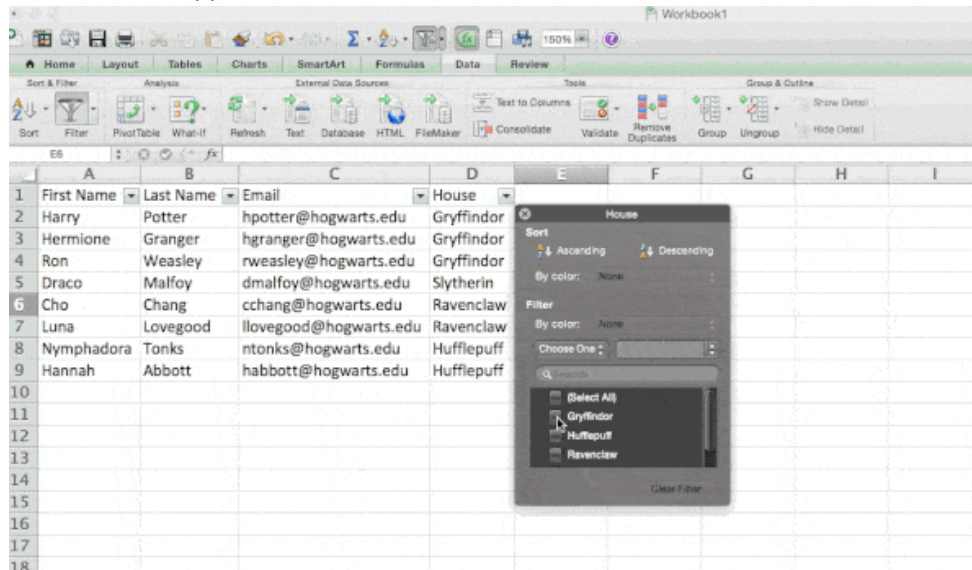
When you're looking at very large data sets, you don't usually need to be looking at every single row at the same time. Sometimes, you only want to look at data that fit into certain criteria.

That's where filters come in.

Filters allow you to pare down your data to only look at certain rows at one time. In Excel, a filter can be added to each column in your data — and from there, you can then choose which cells you want to view at once.

Let's take a look at the example below. Add a filter by clicking the Data tab and selecting "Filter." Clicking the arrow next to the column headers and you'll be able to choose whether you want your data to be organized in ascending or descending order, as well as which specific rows you want to show.

In my Harry Potter example, let's say I only want to see the students in Gryffindor. By selecting the Gryffindor filter, the other rows disappear.

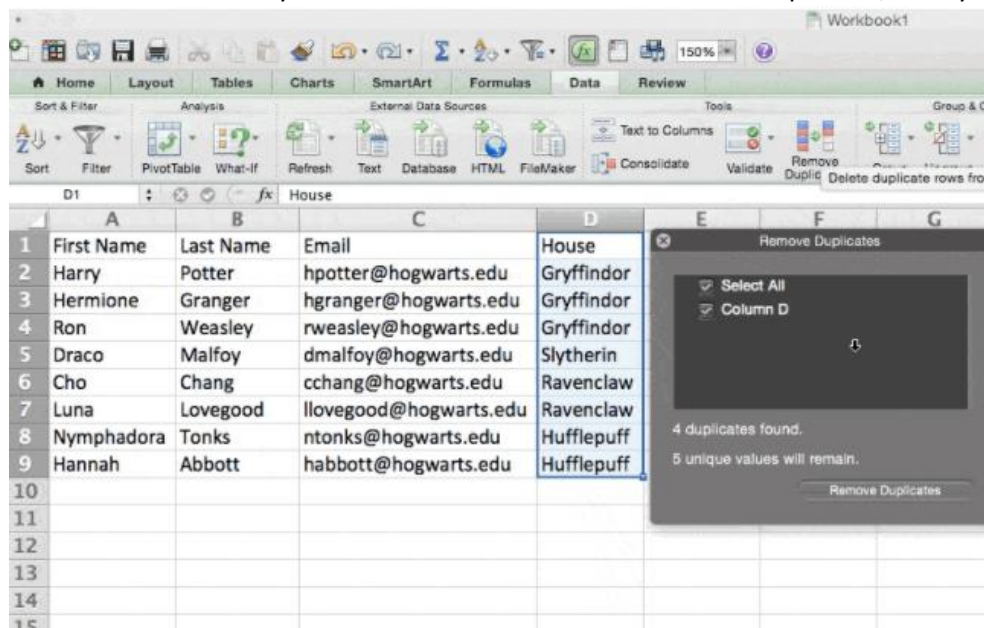


Pro Tip: Copy and paste the values in the spreadsheet when a Filter is on to do additional analysis in another spreadsheet.

Remove duplicate data points or sets.

Larger data sets tend to have duplicate content. You may have a list of multiple contacts in a company and only want to see the number of companies you have. In situations like this, removing the duplicates comes in quite handy.

To remove your duplicates, highlight the row or column that you want to remove duplicates of. Then, go to the Data tab and select "Remove Duplicates" (which is under the Tools subheader in the older version of Excel). A pop-up will appear to confirm which data you want to work with. Select "Remove Duplicates," and you're good to go.

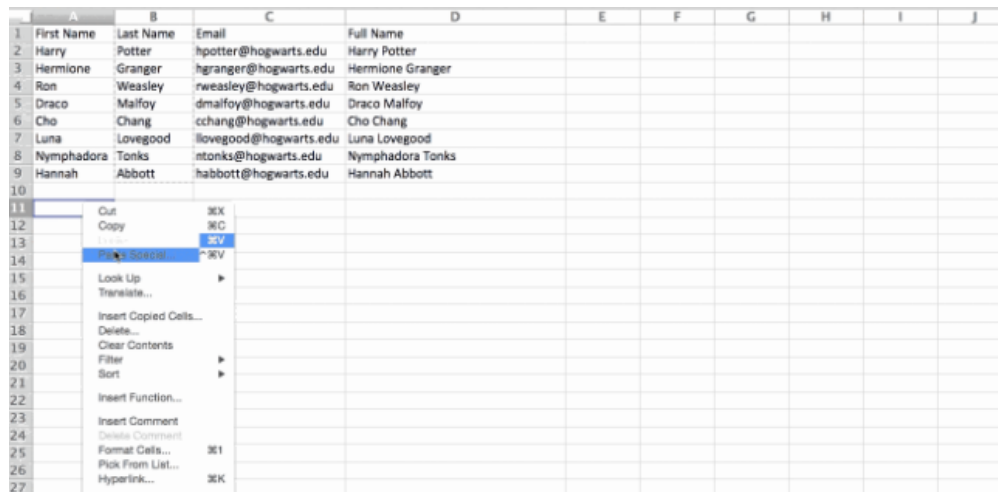


You can also use this feature to remove an entire row based on a duplicate column value. So if you have three rows with Harry Potter's information and you only need to see one, then you can select the whole dataset and then remove duplicates based on email. Your resulting list will have unique names without any duplicates.

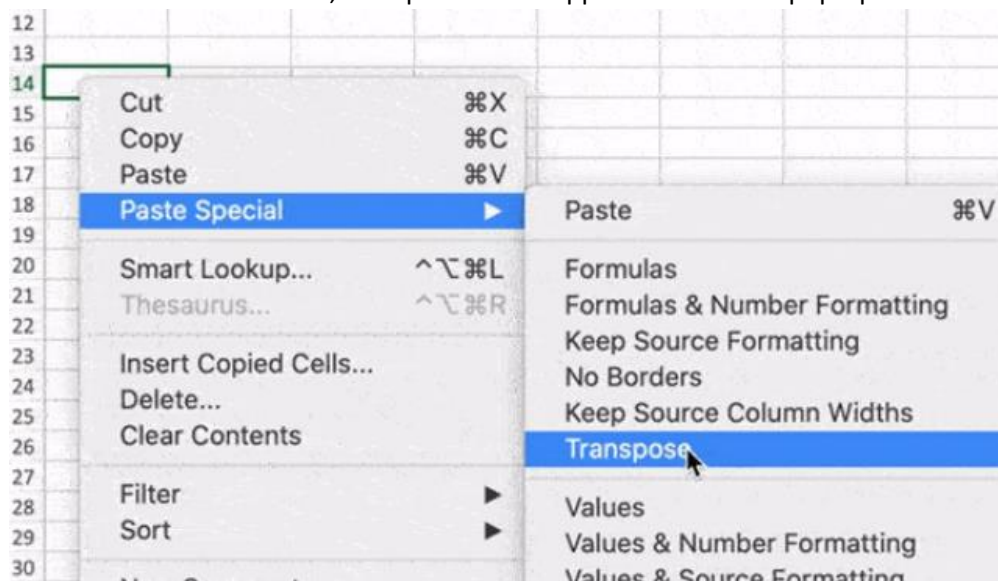
Transpose rows into columns.

When you have rows of data in your spreadsheet, you might decide you want to transform the items in one of those rows into columns (or vice versa). It would take a lot of time to copy and paste each header — but what the transpose feature allows you to do is simply move your row data into columns, or the other way around.

Start by highlighting the column that you want to transpose into rows. Right-click it, and then select "Copy." Next, select the cells on your spreadsheet where you want your first row or column to begin. Right-click on the cell, and then select "Paste Special." A module will appear — at the bottom, you'll see an option to transpose. Check that box and select OK. Your column will now be transferred to a row or vice-versa.



On newer versions of Excel, a drop-down will appear instead of a pop-up.



Split up text information between columns.

What if you want to split out information that's in one cell into two different cells? For example, maybe you want to pull out someone's company name through their email address. Or perhaps you want to separate someone's full name into a first and last name for your email marketing templates.

Thanks to Excel, both are possible. First, highlight the column that you want to split up. Next, go to the Data tab and select "Text to Columns." A module will appear with additional information.

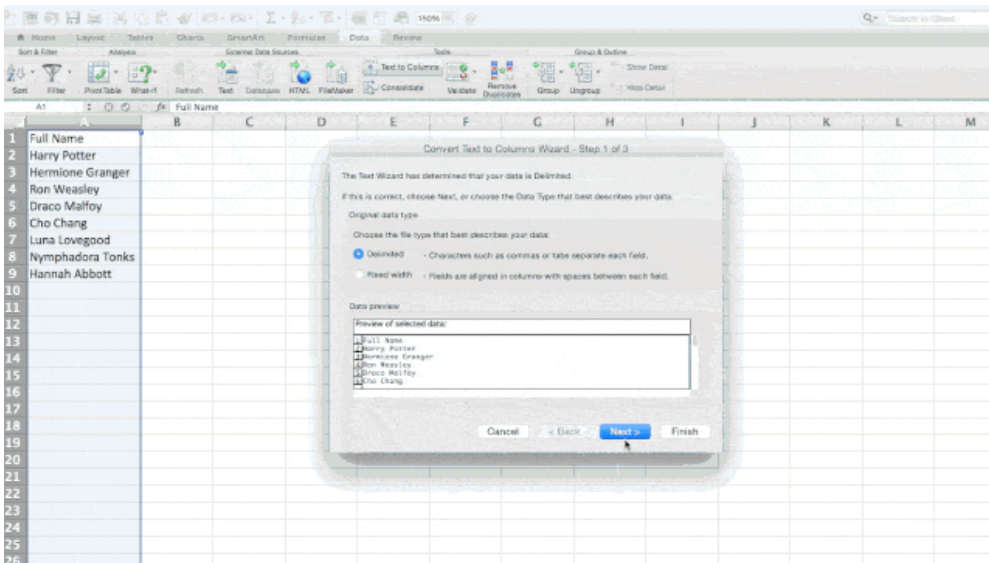
First, you need to select either "Delimited" or "Fixed Width."

- "Delimited" means you want to break up the column based on characters such as commas, spaces, or tabs.
- "Fixed Width" means you want to select the exact location on all the columns that you want the split to occur.

In the example case below, let's select "Delimited" so we can separate the full name into first name and last name.

Then, it's time to choose the Delimiters. This could be a tab, semi-colon, comma, space, or something else. ("Something else" could be the "@" sign used in an email address, for example.) In our example, let's choose the space. Excel will then show you a preview of what your new columns will look like.

When you're happy with the preview, press "Next." This page will allow you to select Advanced Formats if you choose to. When you're done, click "Finish."



Use formulas for simple calculations.

In addition to doing pretty complex calculations, Excel can help you do simple arithmetic like adding, subtracting, multiplying, or dividing any of your data.

- To add, use the + sign.
- To subtract, use the - sign.
- To multiply, use the * sign.
- To divide, use the / sign.

You can also use parentheses to ensure certain calculations are done first. In the example below $(10+10*10)$, the second and third 10 were multiplied together before adding the additional 10. However, if we made it $(10+10)*10$, the first and second 10 would be added together first.

	A	B	C	D	E
1	First Name	Last Name	Email	House	House Points
2	Harry	Potter	hpotter@hogwarts.edu	Gryffindor	10
3	Hermione	Granger	hgranger@hogwarts.edu	Gryffindor	10
4	Ron	Weasley	rweasley@hogwarts.edu	Gryffindor	10
5	Draco	Malfoy	dmalfoy@hogwarts.edu	Slytherin	0
6	Cho	Chang	cchang@hogwarts.edu	Ravenclaw	0
7	Luna	Lovegood	llovegood@hogwarts.edu	Ravenclaw	0
8	Nymphadora	Tonks	ntonks@hogwarts.edu	Hufflepuff	0
9	Hannah	Abbott	habbott@hogwarts.edu	Hufflepuff	0
10					
11	Gryffindor	=E2+E3*			
12	Slytherin				
13	Ravenclaw				
14	Hufflepuff				

Get the average of numbers in your cells.

If you want the average of a set of numbers, you can use the formula =AVERAGE(Cell1:Cell2). If you want to sum up a column of numbers, you can use the formula =SUM(Cell1:Cell2).

Use conditional formatting to make cells automatically change color based on data.

Conditional formatting allows you to change a cell's color based on the information within the cell. For example, if you want to flag certain numbers that are above average or in the top 10% of the data in your spreadsheet, you can do that. If you want to color code commonalities between different rows in Excel, you can do that. This will help you quickly see information that is important to you.

To get started, highlight the group of cells you want to use conditional formatting on. Then, choose "Conditional Formatting" from the Home menu and select your logic from the dropdown. (You can also create your own rule if you want something different.) A window will pop up that prompts you to provide more information about your formatting rule. Select "OK" when you're done, and you should see your results automatically appear.

The screenshot shows an Excel spreadsheet with the following data:

First Name	Last Name	Email	House	House Points
Harry	Potter	hpotter@hogwarts.edu	Gryffindor	10
Hermione	Granger	hgranger@hogwarts.edu	Gryffindor	10
Ron	Weasley	rweasley@hogwarts.edu	Gryffindor	10
Draco	Malfoy	dmalfoy@hogwarts.edu	Slytherin	0
Cho	Chang	cchang@hogwarts.edu	Ravenclaw	0
Luna	Lovegood	llovegood@hogwarts.edu	Ravenclaw	0
Nymphadora	Tonks	ntonks@hogwarts.edu	Hufflepuff	0
Hannah	Abbott	habbott@hogwarts.edu	Hufflepuff	0

The 'House' column is highlighted, and a 'New Formatting Rule' dialog box is open. The rule is configured as follows:

- Style: Classic
- Format only cells that contain: Specific text, containing, Slytherin
- Format with: light red fill with dark red text

Use the IF Excel formula to automate certain Excel functions.

Sometimes, we don't want to count the number of times a value appears. Instead, we want to input different information into a cell if there is a corresponding cell with that information.

For example, in the situation below, I want to award ten points to everyone who belongs in the Gryffindor house. Instead of manually typing in 10's next to each Gryffindor student's name, I can use the IF Excel formula to say that if the student is in Gryffindor, then they should get ten points.

The formula is: `IF(logical_test, value_if_true, [value_if_false])`

Example Shown Below: `=IF(D2="Gryffindor","10","0")`

In general terms, the formula would be `IF(Logical Test, value of true, value of false)`. Let's dig into each of these variables.

- **Logical_Test:** The logical test is the "IF" part of the statement. In this case, the logic is `D2="Gryffindor"` because we want to make sure that the cell corresponding with the student says "Gryffindor." Make sure to put Gryffindor in quotation marks here.
- **Value_if_True:** This is what we want the cell to show if the value is true. In this case, we want the cell to show "10" to indicate that the student was awarded 10 points. Only use quotation marks if you want the result to be text instead of a number.
- **Value_if_False:** This is what we want the cell to show if the value is false. In this case, for any student not in Gryffindor, we want the cell to show "0". Only use quotation marks if you want the result to be text instead of a number.

Excel IF formula in action

Note: In the example above, I awarded 10 points to everyone in Gryffindor. If I later wanted to sum the total number of points, I wouldn't be able to because the 10's are in quotes, thus making them text and not a number that Excel can sum.

The real power of the IF function comes when you string multiple IF statements together or nest them. This allows you to set multiple conditions, get more specific results, and ultimately organize your data into more manageable chunks.

Ranges are one way to segment your data for better analysis. For example, you can categorize data into values that are less than 10, 11 to 50, or 51 to 100. Here's how that looks in practice:

`=IF(B3<11,"10 or less",IF(B3<51,"11 to 50",IF(B3<100,"51 to 100")))`

It can take some trial-and-error, but once you have the hang of it IF formulas will become your new Excel best friend.

Use dollar signs to keep one cell's formula the same regardless of where it moves.

Have you ever seen a dollar sign in an Excel formula? When used in a formula, it isn't representing an American dollar; instead, it makes sure that the exact column and row are held the same even if you copy the same formula in adjacent rows.

You see, a cell reference — when you refer to cell A5 from cell C5, for example — is relative by default. In that case, you're referring to a cell that's five columns to the left (C minus A) and in the same row (5). This is called a relative formula. When you copy a relative formula from one cell to another, it'll adjust the values in the formula based on where it's moved. But sometimes, we want those values to stay the same no matter whether they're moved around or not — and we can do that by turning the formula into an absolute formula.

To change the relative formula ($=A5+C5$) into an absolute formula, we'd precede the row and column values by dollar signs, like this: ($=\$A\$5+\$C\5). (Learn more on Microsoft Office's support page [here](#).)

Use the VLOOKUP function to pull data from one area of a sheet to another.

Have you ever had two sets of data on two different spreadsheets that you want to combine into a single spreadsheet?

For example, you might have a list of people's names next to their email addresses in one spreadsheet, and a list of those same people's email addresses next to their company names in the other — but you want the names, email addresses, and company names of those people to appear in one place.

I have to combine data sets like this a lot — and when I do, the VLOOKUP is my go-to formula.

Before you use the formula, though, be sure that you have at least one column that appears identically in both places. Scour your data sets to make sure the column of data you're using to combine your information is the same, including no extra spaces.

The formula: `=VLOOKUP(lookup value, table array, column number, Approximate match (TRUE) or Exact match (FALSE))`

The formula with variables from our example below: `=VLOOKUP(C2, Sheet2!A: B,2, FALSE)`

In this formula, there are several variables. The following is true when you want to combine the information in Sheet 1 and Sheet 2 onto Sheet 1.

- **Lookup Value:** This is the identical value you have in both spreadsheets. Choose the first value in your first spreadsheet. In the example that follows, this means the first email address on the list, or cell 2 (C2).
- **Table Array:** The table array is the range of columns on Sheet 2 you're going to pull your data from, including the column of data identical to your lookup value (in our example, email addresses) in Sheet 1 as well as the column of data you're trying to copy to Sheet 1. In our example, this is "Sheet2!A: B." "A" means Column A in Sheet 2, which is the column in Sheet 2 where the data identical to our lookup value (email) in Sheet 1 is listed. The "B" means Column B, which contains the information that's only available in Sheet 2 that you want to translate to Sheet 1.
- **Column Number:** This tells Excel which column the new data you want to copy to Sheet 1 is located in. In our example, this would be the column that "House" is located in. "House" is the second column in our range of columns (table array), so our column number is 2. [Note: Your range can be more than two columns. For example, if there are three columns on Sheet 2 — Email, Age, and House — and you still want to bring House onto Sheet 1, you can still use a VLOOKUP. You just need to change the "2" to a "3" so it pulls back the value in the third column: `=VLOOKUP(C2:Sheet2!A: C,3, false).`]
- **Approximate Match (TRUE) or Exact Match (FALSE):** Use FALSE to ensure you pull in only exact value matches. If you use TRUE, the function will pull in approximate matches.

In the example below, Sheet 1 and Sheet 2 contain lists describing different information about the same people, and the common thread between the two is their email addresses. Let's say we want to combine both datasets so that all the house information from Sheet 2 translates over to Sheet 1.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	House			
2	Harry	Potter	hpotter@hogwarts.edu	Gryffindor			
3	Hermione	Granger	hgranger@hogwarts.edu				
4	Ron	Weasley	rweasley@hogwarts.edu				
5	Draco	Malfoy	dmalfoy@hogwarts.edu				
6	Cho	Chang	cchang@hogwarts.edu				
7	Luna	Lovegood	llovegood@hogwarts.edu				
8	Nymphador	Tonks	ntonks@hogwarts.edu				
9	Hannah	Abbott	habbott@hogwarts.edu				
10							

So when we type in the formula `=VLOOKUP(C2, Sheet2!A:B, 2, FALSE)`, we bring all the house data into Sheet 1.

Keep in mind that VLOOKUP will only pull back values from the second sheet that are to the right of the column containing your identical data. This can lead to some limitations, which is why some people prefer to use the INDEX and MATCH functions instead.

Use INDEX and MATCH formulas to pull data from horizontal columns.

Like VLOOKUP, the INDEX and MATCH functions pull data from another dataset into one central location. Here are the main differences:

- VLOOKUP is a much simpler formula. If you're working with large data sets that would require thousands of lookups, using the INDEX and MATCH function will significantly decrease load time in Excel.
- The INDEX and MATCH formulas work right-to-left, whereas VLOOKUP formulas only work as a left-to-right lookup. In other words, if you need to do a lookup that has a lookup column to the right of the results column, then you'd have to rearrange those columns to do a VLOOKUP. This can be tedious with large datasets and/or lead to errors.

So if I want to combine the information in Sheet 1 and Sheet 2 onto Sheet 1, but the column values in Sheets 1 and 2 aren't the same, then to do a VLOOKUP, I would need to switch around my columns. In this case, I'd choose to do an INDEX and MATCH instead.

Let's look at an example. Let's say Sheet 1 contains a list of people's names and their Hogwarts email addresses, and Sheet 2 contains a list of people's email addresses and the Patronus that each student has. (For the non-Harry Potter fans out there, every witch or wizard has an animal guardian called a "Patronus" associated with him or her.) The information that lives in both sheets is the column containing email addresses, but this email address column is in different column numbers on each sheet. I'd use the INDEX and MATCH formulas instead of VLOOKUP so I wouldn't have to switch any columns around.

So what's the formula, then? The formula is the MATCH formula nested inside the INDEX formula. You'll see I differentiated the MATCH formula using a different color here.

The formula: `=INDEX(table array, MATCH formula)`

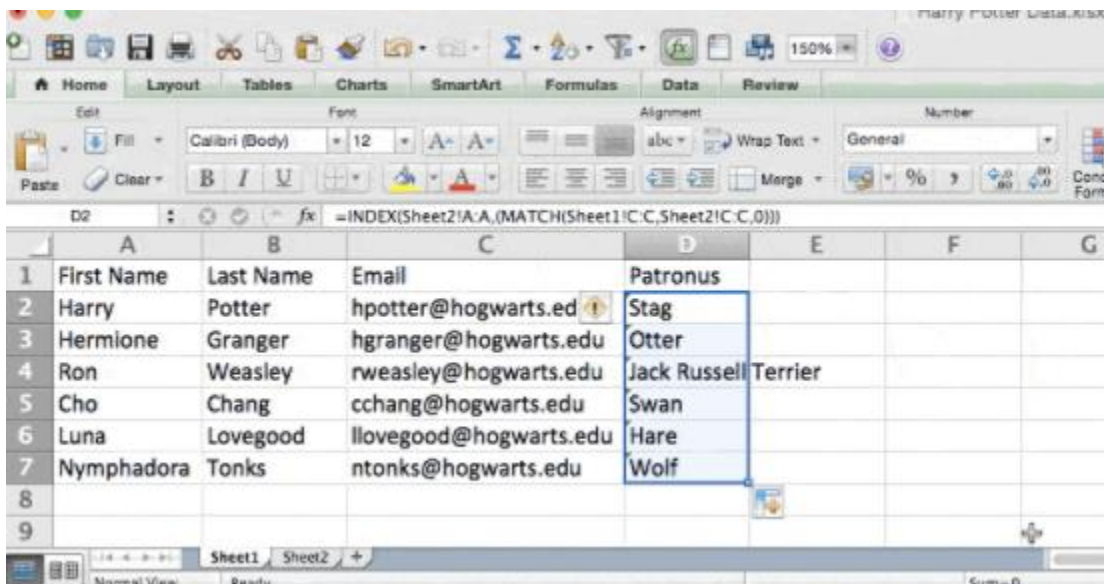
This becomes: =INDEX(table array, MATCH (lookup_value, lookup_array))

The formula with variables from our example below: =INDEX(Sheet2!A:A,(MATCH(Sheet1!C:C,Sheet2!C:C,0)))

Here are the variables:

- Table Array: The range of columns on Sheet 2 containing the new data you want to bring over to Sheet 1. In our example, "A" means Column A, which contains the "Patronus" information for each person.
- Lookup Value: This is the column in Sheet 1 that contains identical values in both spreadsheets. In the example that follows, this means the "email" column on Sheet 1, which is Column C. So: Sheet1!C: C.
- Lookup Array: This is the column in Sheet 2 that contains identical values in both spreadsheets. In the example that follows, this refers to the "email" column on Sheet 2, which happens to also be Column C. So: Sheet2!C: C.

Once you have your variables straight, type in the INDEX and MATCH formulas in the top-most cell of the blank Patronus column on Sheet 1, where you want the combined information to live.



Use the COUNTIF function to make Excel count words or numbers in any range of cells.

Instead of manually counting how often a certain value or number appears, let Excel do the work for you. With the COUNTIF function, Excel can count the number of times a word or number appears in any range of cells.

For example, let's say I want to count the number of times the word "Gryffindor" appears in my data set.

The formula: =COUNTIF(range, criteria)

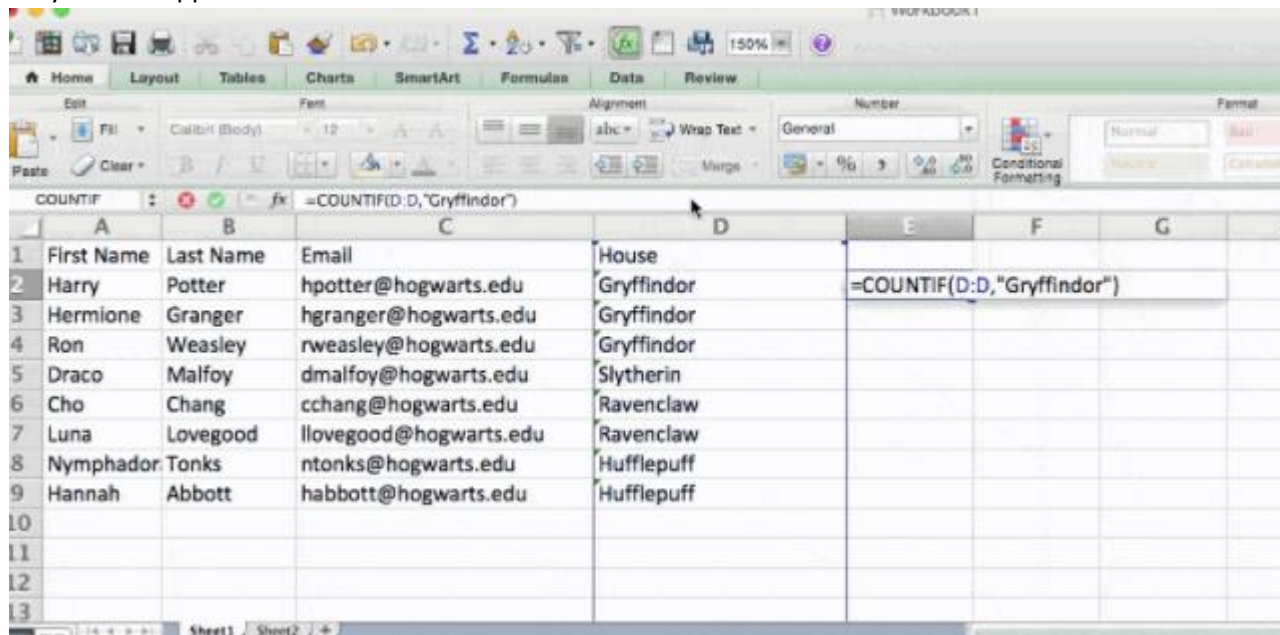
The formula with variables from our example below: =COUNTIF(D:D, "Gryffindor")

In this formula, there are several variables:

Range: The range that we want the formula to cover. In this case, since we're only focusing on one column, we use "D:D" to indicate that the first and last column are both D. If I were looking at columns C and D, I would use "C:D."

Criteria: Whatever number or piece of text you want Excel to count. Only use quotation marks if you want the result to be text instead of a number. In our example, the criteria are "Gryffindor."

Simply typing in the COUNTIF formula in any cell and pressing "Enter" will show me how many times the word "Gryffindor" appears in the dataset.



Combine cells using &.

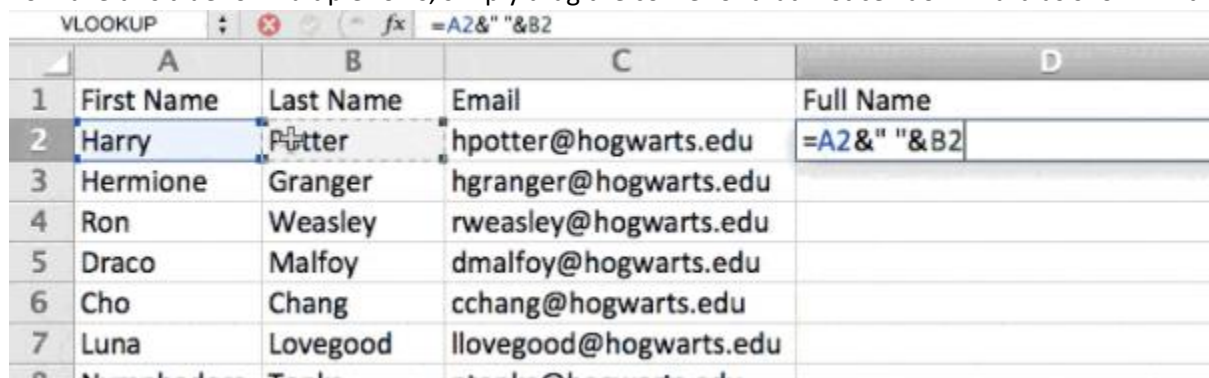
Databases tend to split out data to make it as exact as possible. For example, instead of having a column that shows a person's full name, a database might have the data as a first name and then the last name in separate columns. Or, it may have a person's location separated by city, state, and zip code. In Excel, you can combine cells with different data into one cell by using the "&" sign in your function.

The formula with variables from our example below: `=A2&" "&B2`

Let's go through the formula together using an example. Pretend we want to combine first names and last names into full names in a single column. To do this, we'd first put our cursor in the blank cell where we want the full name to appear. Next, we'd highlight one cell that contains a first name, type in an "&" sign, and then highlight a cell with the corresponding the last name.

But you're not finished — if all you type in is `=A2&B2`, then there will not be a space between the person's first name and last name. To add that necessary space, use the function `=A2&" "&B2`. The quotation marks around the space tell Excel to put a space in between the first and last name.

To make this true for multiple rows, simply drag the corner of that first cell downward as shown in the example.



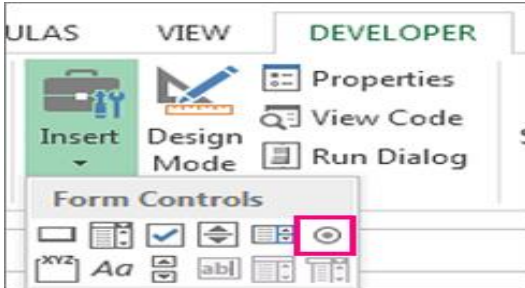
Add checkboxes.

If you're using an Excel sheet to track customer data and want to oversee something that isn't quantifiable, you could insert checkboxes into a column.

For example, if you're using an Excel sheet to manage your sales prospects and want to track whether you called them in the last quarter, you could have a "Called this quarter?" column and check off the cells in it when you've called the respective client.

Here's how to do it.

Highlight a cell you'd like to add checkboxes to in your spreadsheet. Then, click DEVELOPER. Then, under FORM CONTROLS, click the checkbox or the selection circle highlighted in the image below.



Once the box appears in the cell, copy it, highlight the cells you also want it to appear in, and then paste it.

Hyperlink a cell to a website.

If you're using your sheet to track social media or website metrics, it can be helpful to have a reference column with the links each row is tracking. If you add a URL directly into Excel, it should automatically be clickable. But, if you have to hyperlink words, such as a page title or the headline of a post you're tracking, here's how.

Highlight the words you want to hyperlink, then press Shift K. From there a box will pop up allowing you to place the hyperlink URL. Copy and paste the URL into this box and hit or click Enter.

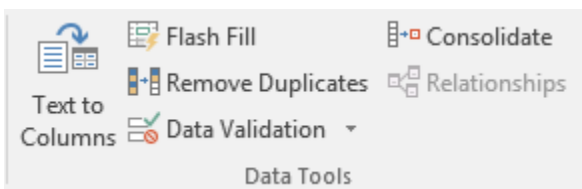
If the key shortcut isn't working for any reason, you can also do this manually by highlighting the cell and clicking Insert > Hyperlink.

Add drop-down menus.

Sometimes, you'll be using your spreadsheet to track processes or other qualitative things. Rather than writing words into your sheet repetitively, such as "Yes", "No", "Customer Stage", "Sales Lead", or "Prospect", you can use dropdown menus to quickly mark descriptive things about your contacts or whatever you're tracking.

Here's how to add drop-downs to your cells.

Highlight the cells you want the drop-downs to be in, then click the Data menu in the top navigation and press Validation.



From there, you'll see a Data Validation Settings box open. Look at the Allow options, then click Lists and select Drop-down List. Check the In-Cell dropdown button, then press OK.

Use the format painter.

As you've probably noticed, Excel has a lot of features to make crunching numbers and analyzing your data quick and easy. But if you ever spent some time formatting a sheet to your liking, you know it can get a bit tedious.

Don't waste time repeating the same formatting commands over and over again. Use the format painter to easily copy the formatting from one area of the worksheet to another. To do so, choose the cell you'd like to replicate, then select the format painter option (paintbrush icon) from the top toolbar.

Excel Keyboard Shortcuts

Creating reports in Excel is time-consuming enough. How can we spend less time navigating, formatting, and selecting items in our spreadsheet? Glad you asked. There are a ton of Excel shortcuts out there, including some of our favorites listed below.

- Create a New Workbook
PC: Ctrl-N | Mac: Command-N
- Select Entire Row
PC: Shift-Space | Mac: Shift-Space
- Select Entire Column
PC: Ctrl-Space | Mac: Control-Space
- Select Rest of Column
PC: Ctrl-Shift-Down/Up | Mac: Command-Shift-Down/Up
- Select Rest of Row
PC: Ctrl-Shift-Right/Left | Mac: Command-Shift-Right/Left
- Add Hyperlink
PC: Ctrl-K | Mac: Command-K
- Open Format Cells Window
PC: Ctrl-1 | Mac: Command-1
- Autosum Selected Cells
PC: Alt-= | Mac: Command-Shift-T