## AI-powered Excel Demo notes

**Flash fill**

As more data is added, the algorithm becomes smarter… AI in a nutshell!

**Column by example**

In this example we want to recode Technology as Tech, Consumer Discretionary as Consumer, and Consumer Staples as Consumer.

If Column by example is returning NULLs, that means it’s not finding a pattern in your data – you’re on your own!

**Formula by example**

This feature is currently only available in Excel Online. Make sure your data in a table before using this feature!

The keyboard shortcut Ctrl + L works better than Ctrl + T in a browser context.

**Fuzzy matching**

This is done in Power Query.

Let’s look up info about the customer for each transaction.

* Adjust similarity threshold to get more/less matches
* I will cap the Max number of matches at 1. I don’t want the same transaction to associated with 2 people

A screenshot of a computer

Description automatically generated

Expand out the results – how accurate do they seem?

You can explicitly link records with a transformation table if needed.

**Insert data as picture**

* Go to Data > From picture > Picture from File and select customer\_reviews.png
* Review the data for any typos
* Manually adjust the data that doesn’t get put into the grid correctly
* Good idea to do a final spell check: Review > Spelling

**Forecast sheet**

* For best results, place the data you want to forecast to the right of your date
* Go under options and check how the aggregation is set – will be come important later!

A screenshot of a computer

Description automatically generated

**Linked data types**

* Set them under Data > Data Types
* It’s possible to make custom linked data types: <https://support.microsoft.com/en-us/office/create-a-data-type-power-query-a465a3b7-3d37-4eb1-a59c-bd3163315308>

**Analyze Data**

* Home > Analyze Data
* Use the suggested questions or ask your own!
* What happens if you ask for total sales by region?
* This data is not in a well structured format for AI. Unpivot this in Power Query
* Now it’s much easier, but you still need to be careful with how you prompt!