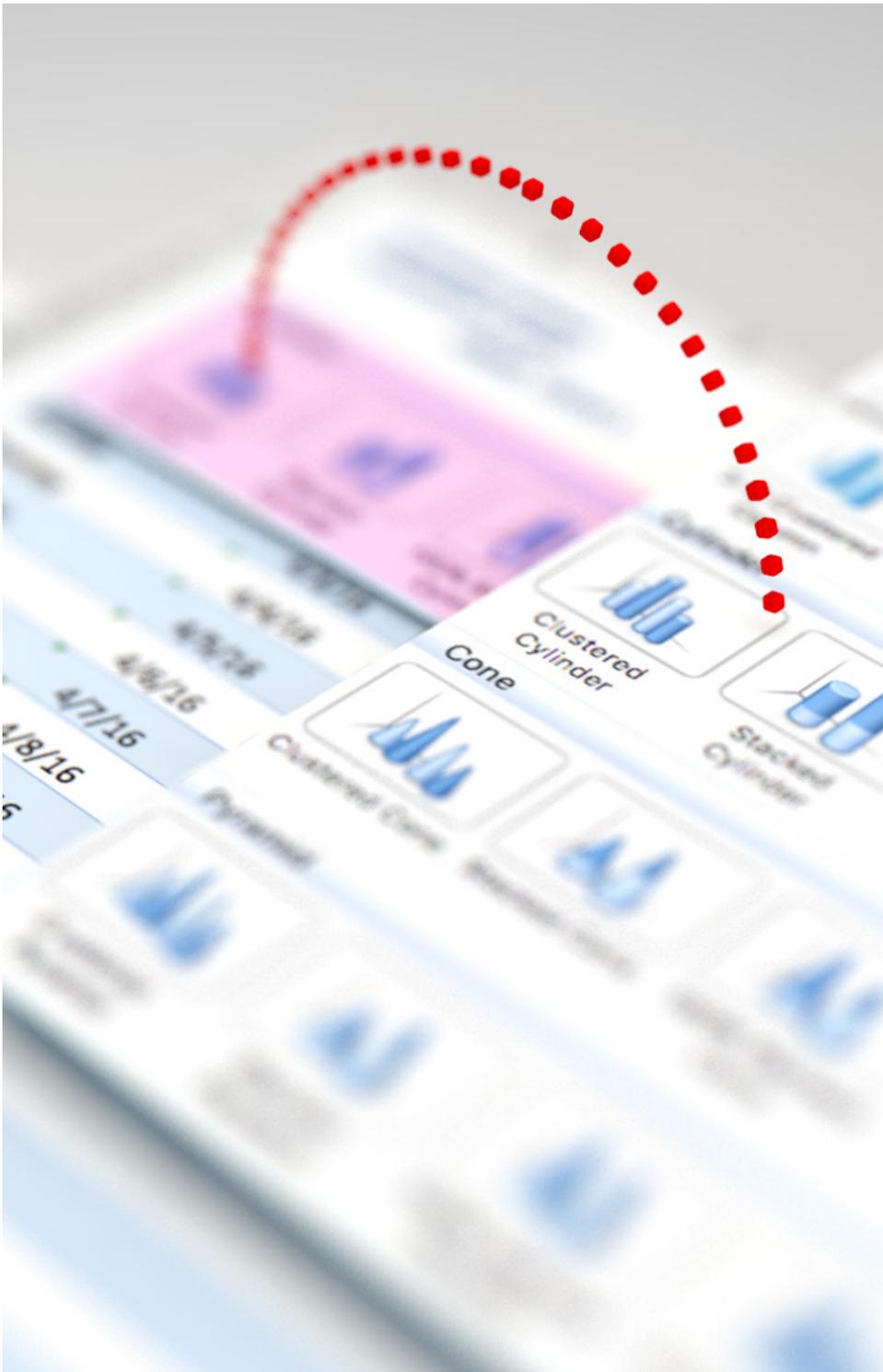




Top 5 Excel Tips & Tricks

Every Finance Manager Should Know

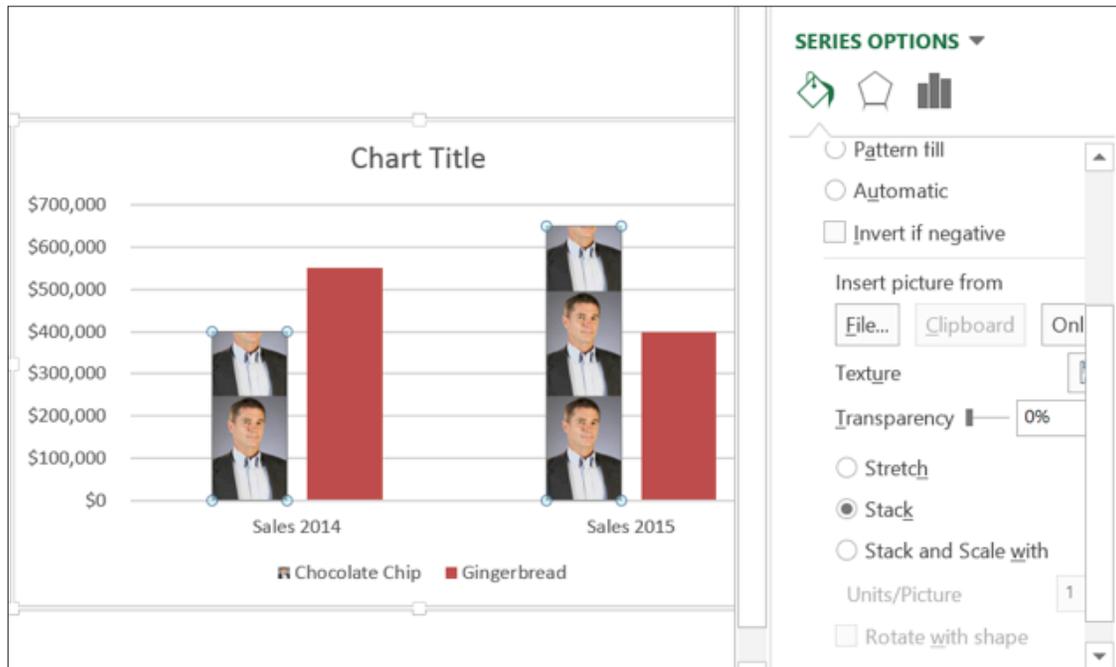


**If you've worked in finance long enough,
you know that Excel is your LIFE.**

At Jet Reports, we love Excel! Over the years, we've spoken to a number of finance professionals, and one thing we've learned is that there is always more to learn when it comes to Excel!

Whether you know enough to get by, or you consider yourself an expert, these tips & tricks are sure to help you step up your Excel game.





TIP # 1

Using Pictographs

What it is:

In a pictograph, pictures replace the colored columns or bars in a regular column chart or bar graph. Impress your boss by REALLY personalizing your financial statements and performance charts.

How to do it:

1. Create a bar or column chart inside of Excel.
2. Select a single or multiple data series in the chart.
3. Double click to get to the “Format Data Series” options.
4. Under “Fill” select “Picture or texture fill.”
5. In the “Insert Picture From” area, you can select clip art or a picture from file.
6. Make your selection.
7. For added effect, select the “Stack” format option.

Fun Fact:

We filled that graph with Joe, CEO of Jet Reports. Think we'll get brownie points for that?

TIP # 2

Flash Fill

What it is:

A way to “automagically” fill out data in a worksheet based on a given example. In other words, you don’t need long formulas to separate cell content anymore. The most common example? Separating first names and last names into separate cells. The struggle is real! Or should we say, it used to be.

How to do it:

1. Fill the worksheet in with one example of how you want the results.

For example:

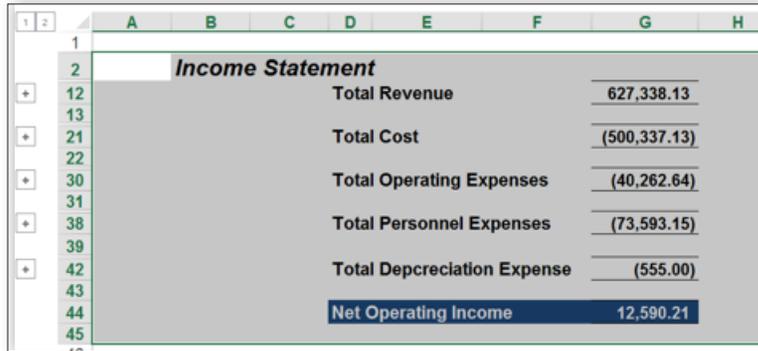
Name	First	Last
Grant, Tara		
Oesch, Jon		
Andrews, Jim		
Little, Joe		
Larsson, Alex		
Bonaduce, Anthony		
Petersen, Brian		
Oster, Emiley		

2. With your cursor in the next cell to be filled in (as shown above) go to the Home Ribbon, click on the Fill button, and select the Flash Fill option.
3. Repeat for each column that needs “magically” populated.

Name	First	Last
Grant, Tara	Tara	Grant
Oesch, Jon	Jon	Oesch
Andrews, Jim	Jim	Andrews
Little, Joe	Joe	Little
Larsson, Alex		
Bonaduce, Anthony		
Petersen, Brian		
Oster, Emiley		

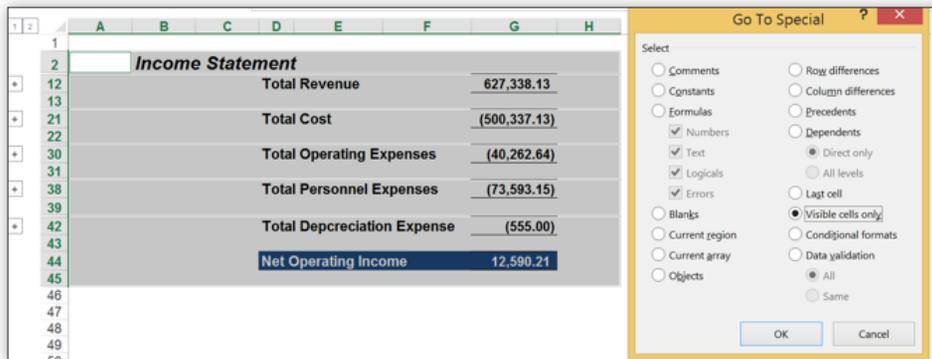
How to do it:

1. With your cursor, make the selection of what you want to copy and paste into a new workbook.



Income Statement	
Total Revenue	627,338.13
Total Cost	(500,337.13)
Total Operating Expenses	(40,262.64)
Total Personnel Expenses	(73,593.15)
Total Depreciation Expense	(555.00)
Net Operating Income	12,590.21

2. Hit CTRL+G to get to the “Go To” options pop up box.
3. Select “Special.”
4. Select “Visible Cells Only.”



5. Now Copy + Paste as you normally would.
6. See... only the visible cells, not all the other junk!

TIP # 3

Paste Visible Cells Only

What it is:

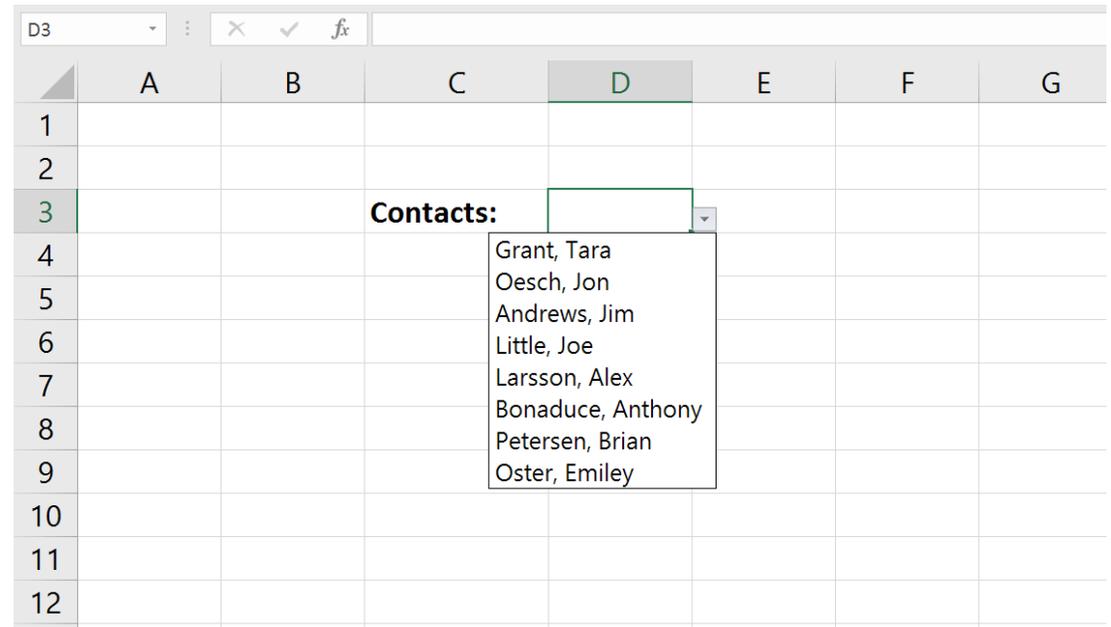
No fail, you have a perfectly formatted financial summary that you need to paste into another worksheet - but all that hidden and grouped detailed data comes along with it! Instead of manually selecting each line (or deleting the unwanted ones after the fact) use this fast trick to paste only the visible cells.

TIP # 4

Drop Down Lists

What it is:

Sometimes you need to make your workbooks fool (and idiot) proof. Not just to be pretty and easier to use, but also to prevent text being put in inconsistently or incorrectly. Think report filters or items on an order form. Drop down lists to the rescue! They control the data that can be entered in a cell by limiting options. Oh and they happen to look impressive too.



How to do it:

1. Enter the list of items you want to appear in the drop down somewhere in the worksheet. Generally this is hidden toward the bottom of a page, or far right column. You can also hide the column or rows you enter this in.
2. With your cursor in the cell you want the drop down to appear, go to the Data Ribbon. Select "Data Validation".
3. In the Validation Criteria, under "Allow:" Select "List."
4. Put your cursor in the "Source:" option, and now select your range of cells you created in step #1.
5. Hit Enter. Enjoy your drop down list!



TIP # 5

Real Keyboard Shortcuts

What it is:

Look, CTRL+F5+Backspace+Alt+Fn is not a shortcut – it's practically an intermediate yoga move. Here are the best keyboard shortcuts to keep handy, because they really are shortcuts.

1. F11 = Start/Open a New Sheet
2. Shift + F11 = Insert a New Sheet
3. CTRL + F = Find and Replace
4. F7 = Spell Check
5. Alt + = = AutoSum Formula



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Over 10,000 companies rely on Jet Reports every day for their financial reporting.