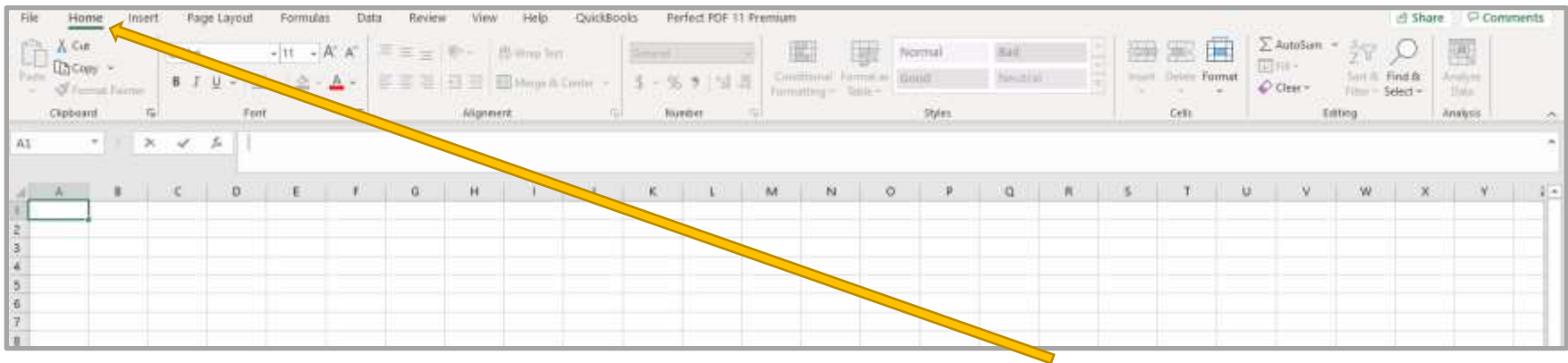


Excel Basics

This document is not meant to replace or be used as the only source for learning Excel. It is meant to be used as a reference point for those who may have none to little knowledge of Excel. Each Worksheet has at least one tab with a name at the bottom of the page. We are going to review just one Worksheet.



Example of the top of a New Worksheet. Changing the Auto Save to “On” will allow the program to save your worksheet as you go automatically. It will require a Microsoft Account to continue. Next icon is the standard SAVE icon. This allows you to save the file yourself as you go. Far right is the name of the file.

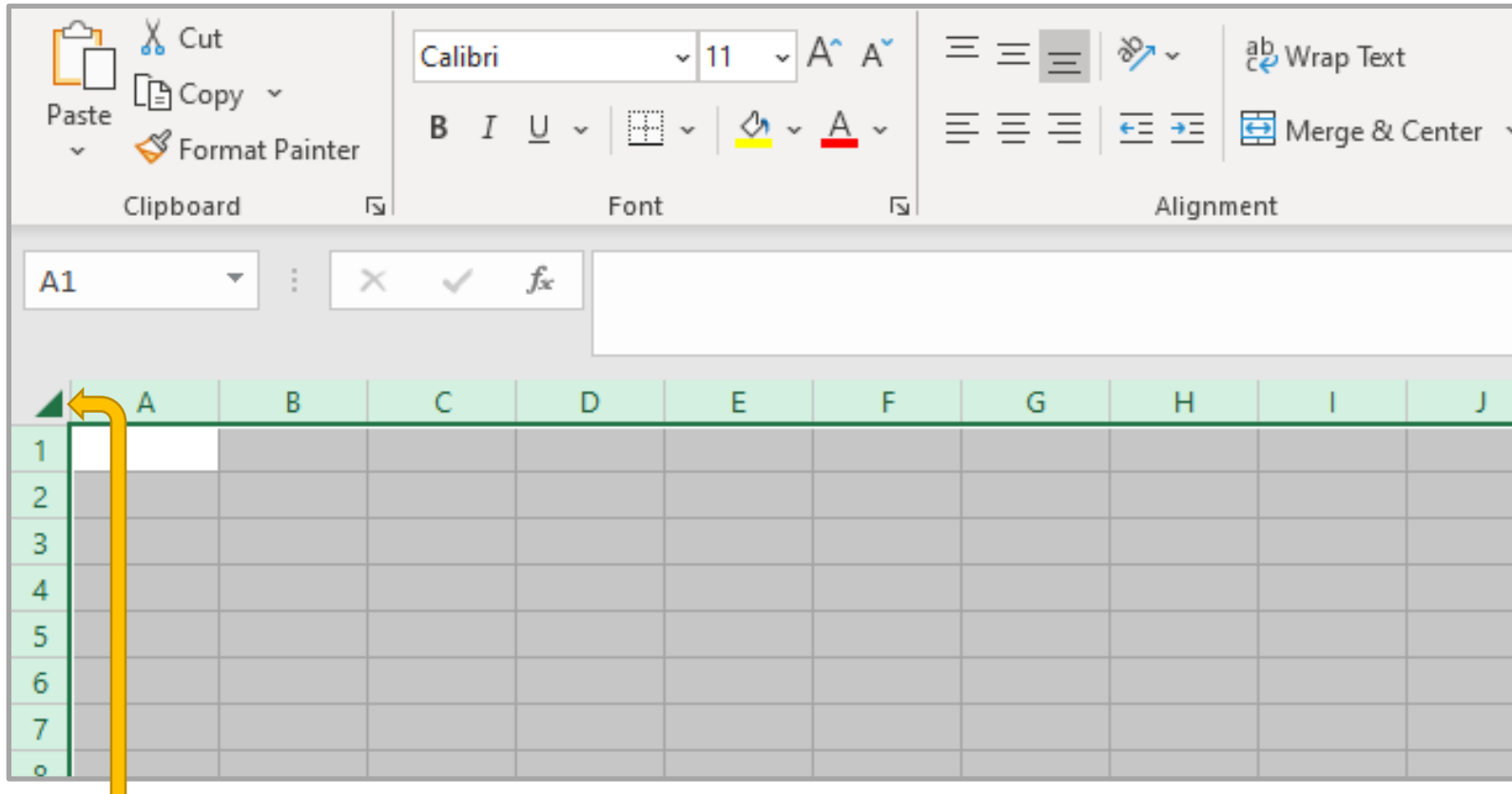


This is the main screen of the NEW Worksheet. As you can see there are many options and many TABS. Each Tab will have its own Menu choices. Above you can see that we are on the Home TAB, since it is underlined.

Ctrl-V, Ctrl-C, Ctrl-X will all work in this worksheet. Standard Microsoft “Short cut keys” apply.

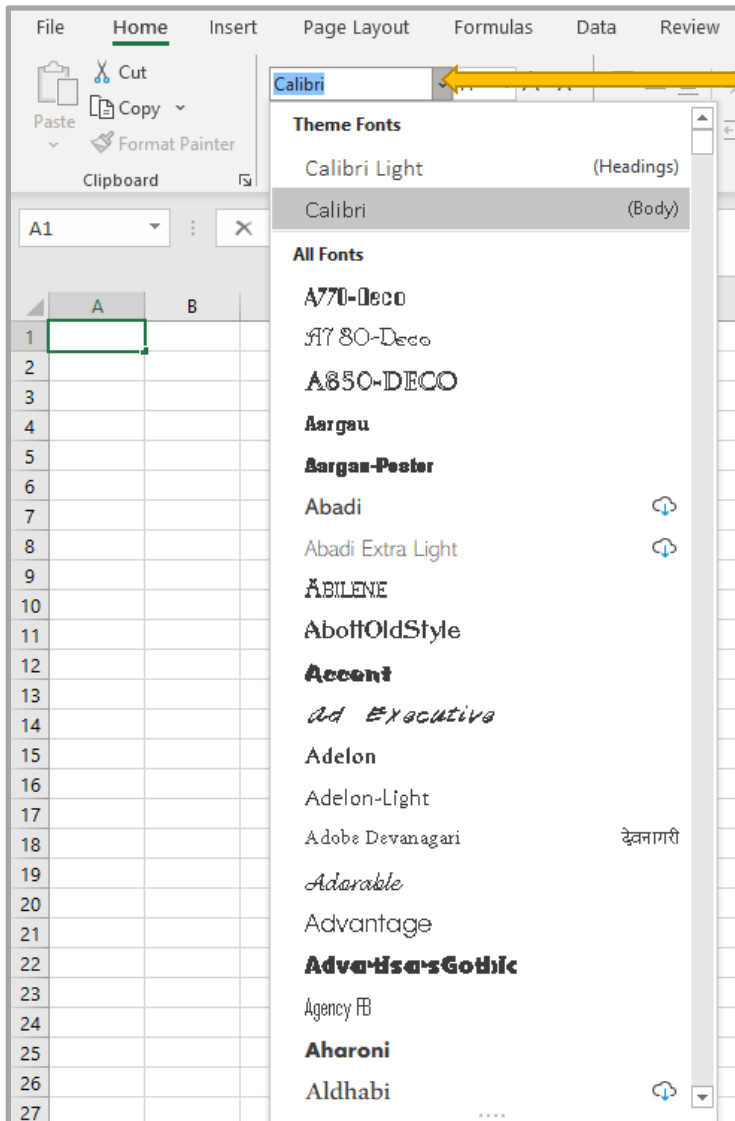
Excel Basics

Highlighting the entire worksheet allows you to make changes to all the columns and rows at the same time.

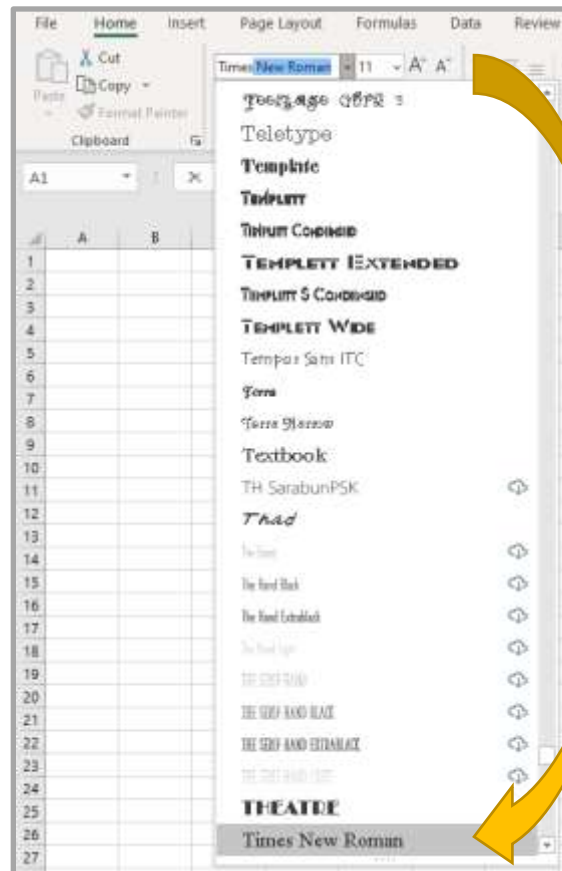


Use the small icon that is in the middle between the columns and rows to highlight the entire worksheet.

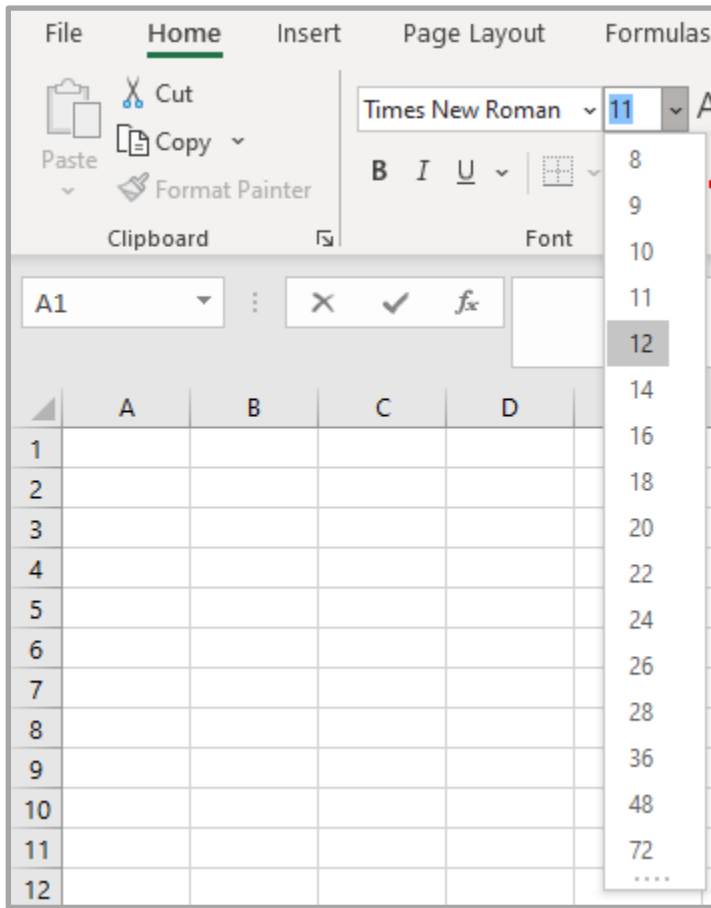
Excel Basics



To change the Font of your worksheet you can use the drop down or you may type the name of the font. Times New Roman is a larger/clearer than the default font Calibri.

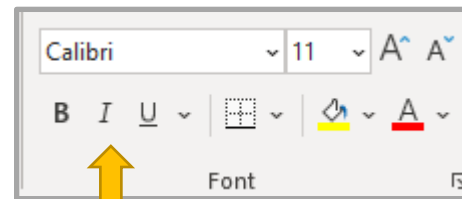


Excel Basics



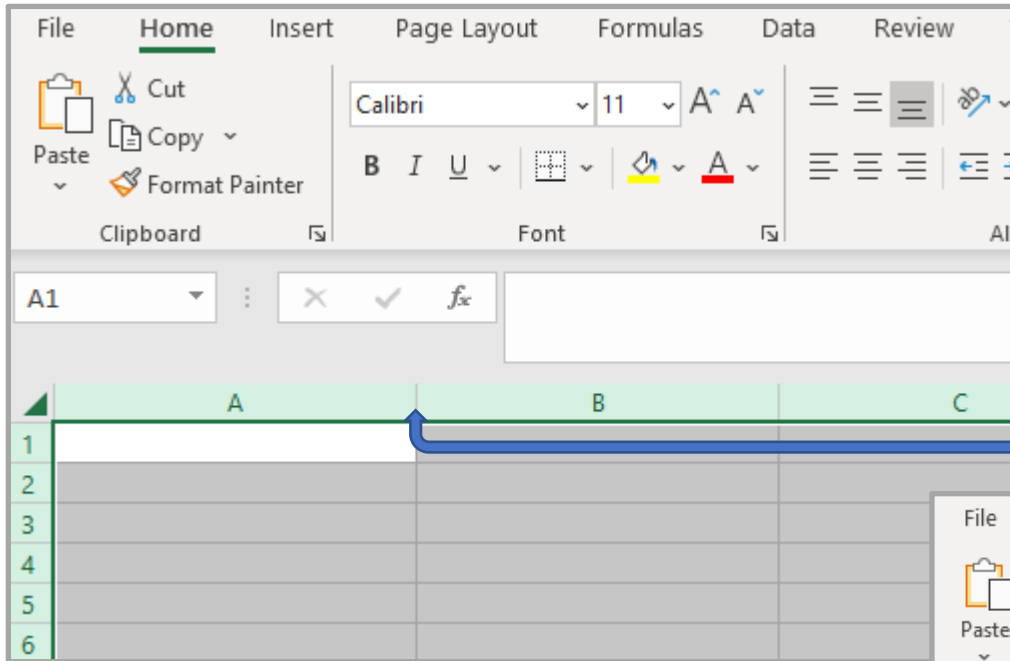
Changing the font size can be done the same way.

Most use 12 or 14 as a font size so that others can read what you have done.



Bold Italic Underline

Excel Basics



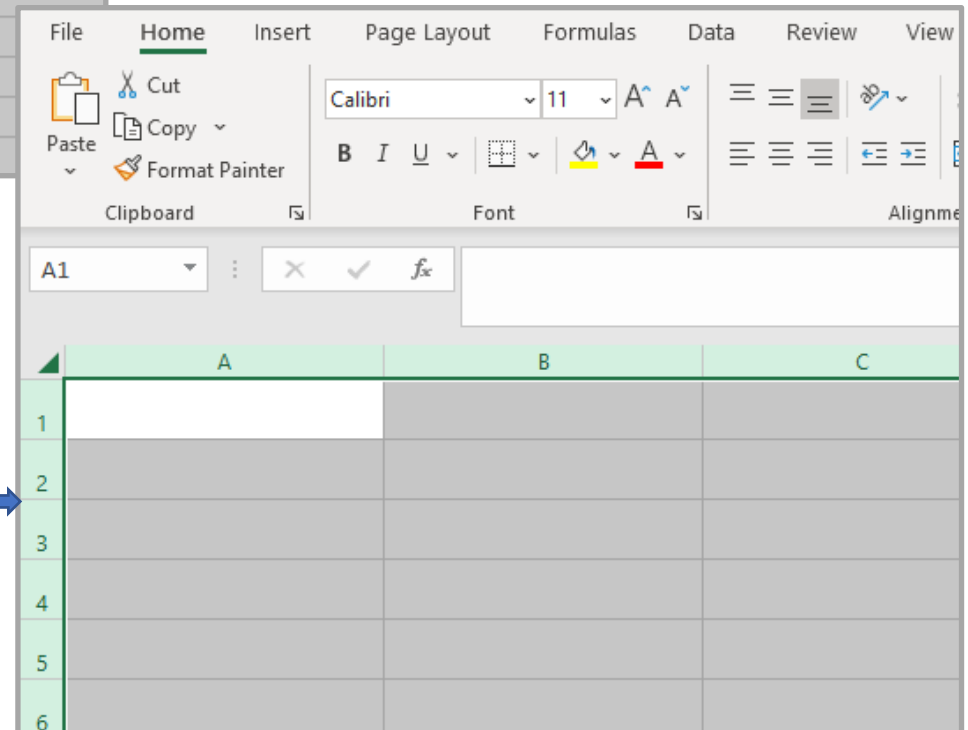
To change the width of a column:

With your mouse “Right click” while on the line in between the column, then slide to the right. If the worksheet has been highlighted first this will change all the columns to match.

To change just one column, make sure the worksheet has not been highlighted.

To change the height of a row:

With your mouse “Right click” while on the line in between the rows, then slide down. If the worksheet has been highlighted first this will change all the columns to match.



To change just one column, make sure the worksheet has not been highlighted.

Excel Basics

Now it is time to work on Cell attributes and functions.

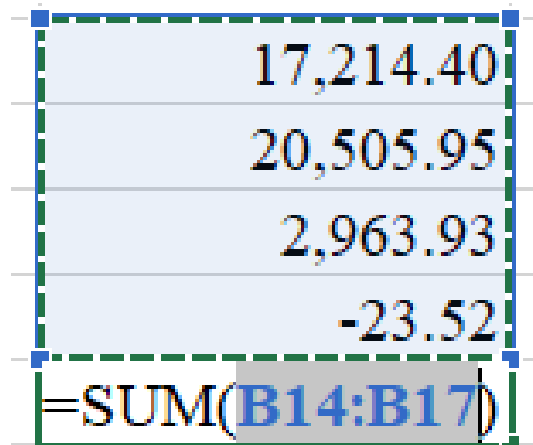


At one time or another you will need to Total a row or Total a column.

While on the HOME TAB you will find a symbol for Auto Sum.

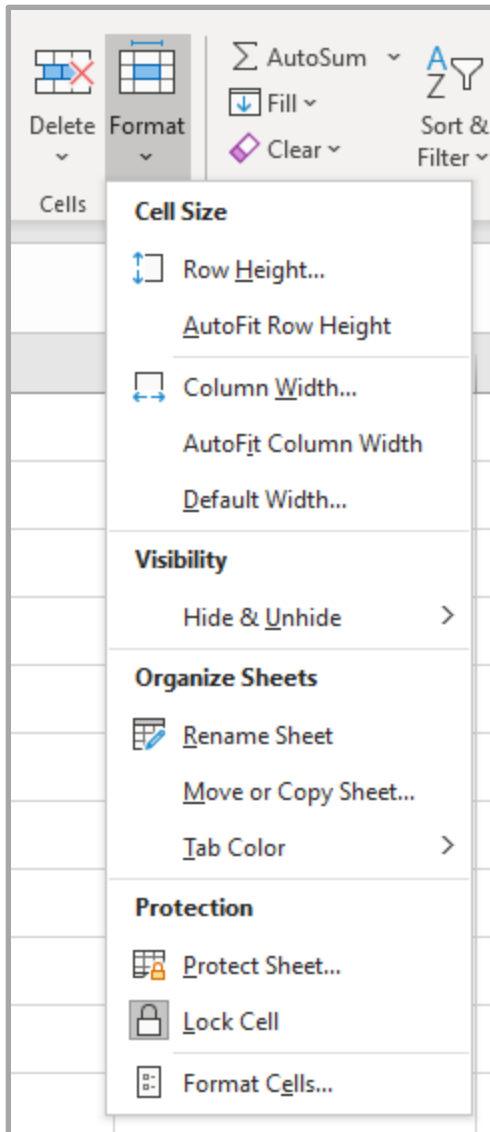


With this symbol you can add columns or rows. Just select the range needed.



Excel will automatically assume you want the totals above the Cell you are working on. For most cases this would be correct. If you want a total of columns you will need to use your mouse to highlight the columns you want to add together.

Excel Basics



There are two ways to format a cell, change the Visibility (hide or Unhide), Organize the sheets or even Protect the sheets.

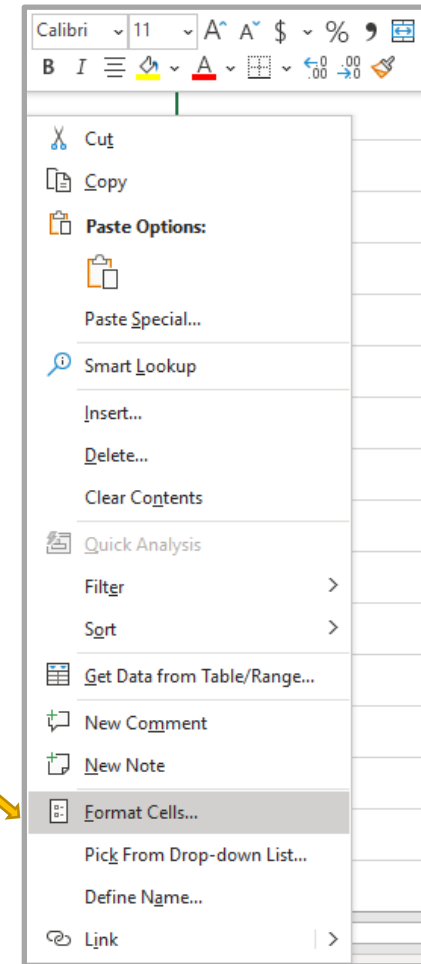
From the Home Menu to the left of Auto Sum is Format. As you can see from the drop-down there are many choices.

(See above notes on making columns and rows larger)

Right click on any cell and another choice of options for the cell will provide a drop-down or drop-up list of options.

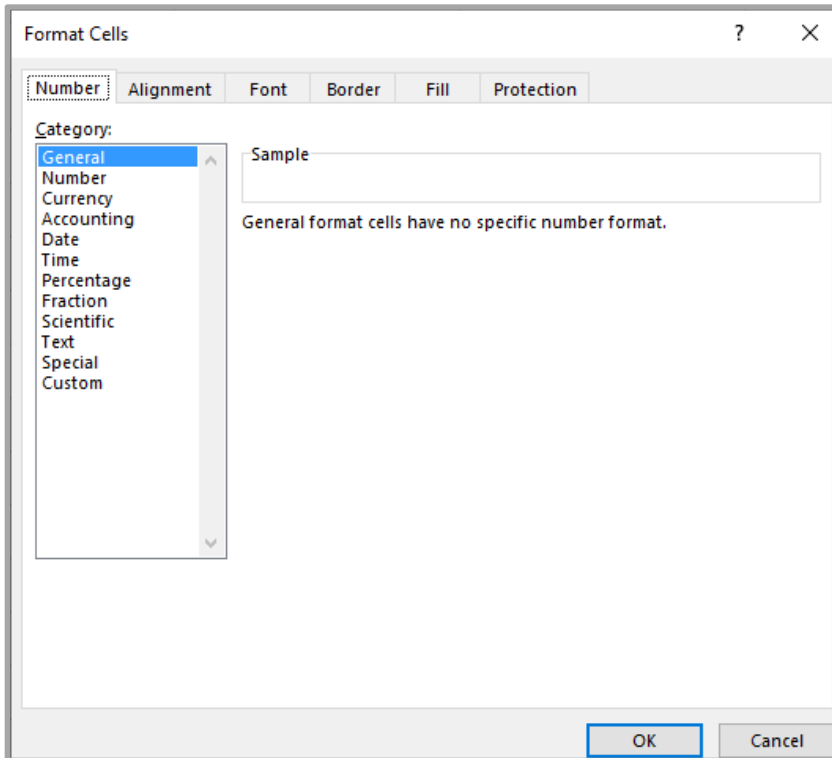
Near the bottom in Format Cells.

Organize Sheets can be done by right clicking the tab name as well.



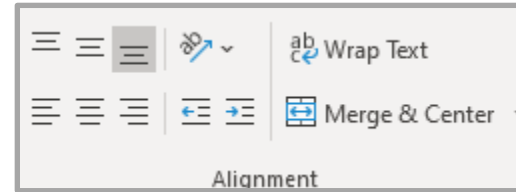
Excel Basics

“Format Cells” box has the following:

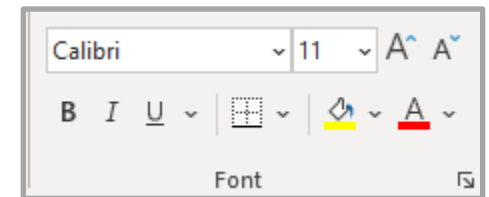


Number – change how you want that cell to reflect the information you put in it.

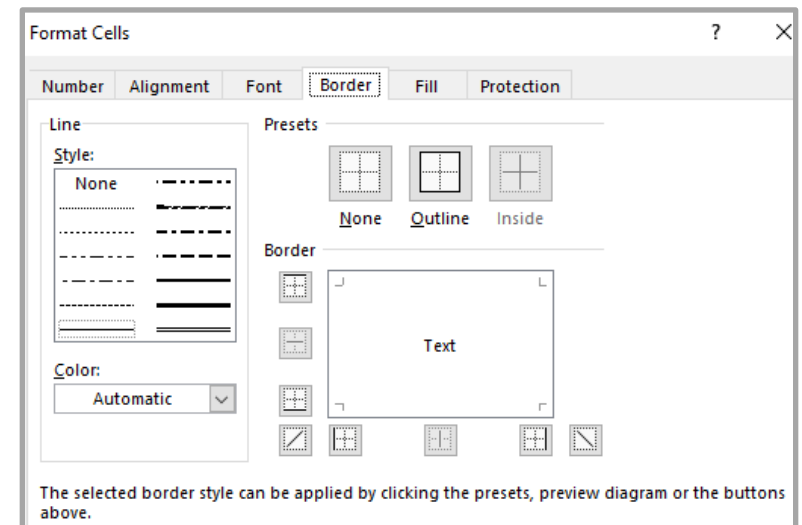
Alignment – Same as the Home Menu options.



Font – Same as the Home Menu options.



Border –



Excel Basics

Misc Procedures

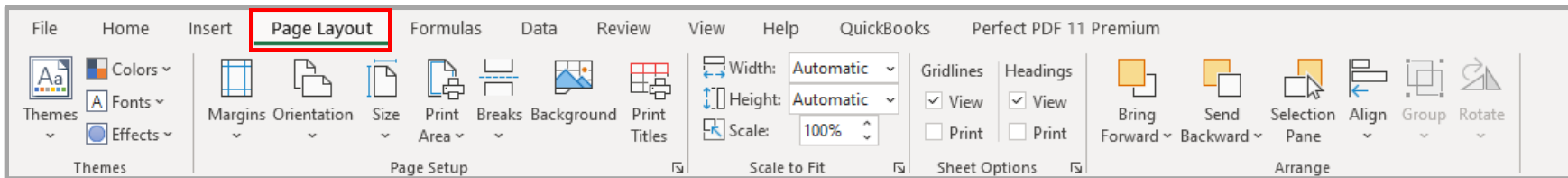
Next Menu Option is “Insert”



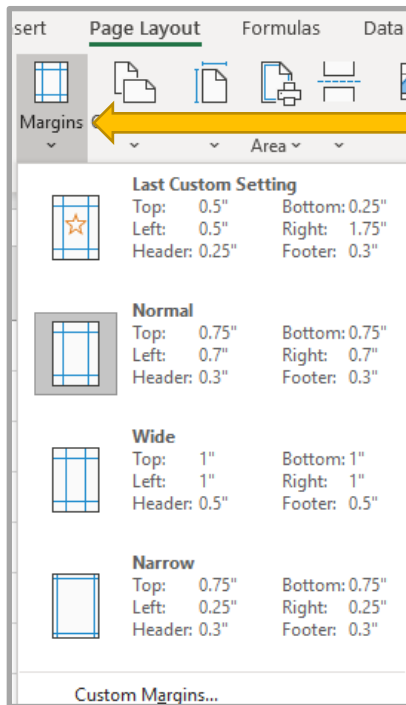
The most important items on this menu are “Header & Footer.”



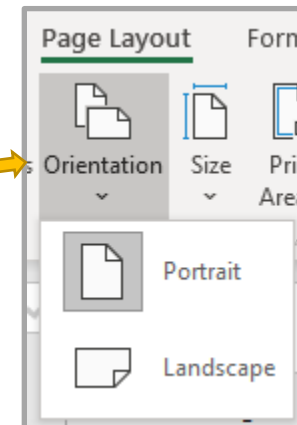
Next Menu Option is “Page Layout”



Margin Options allow you to change your page margins before you get to printing.

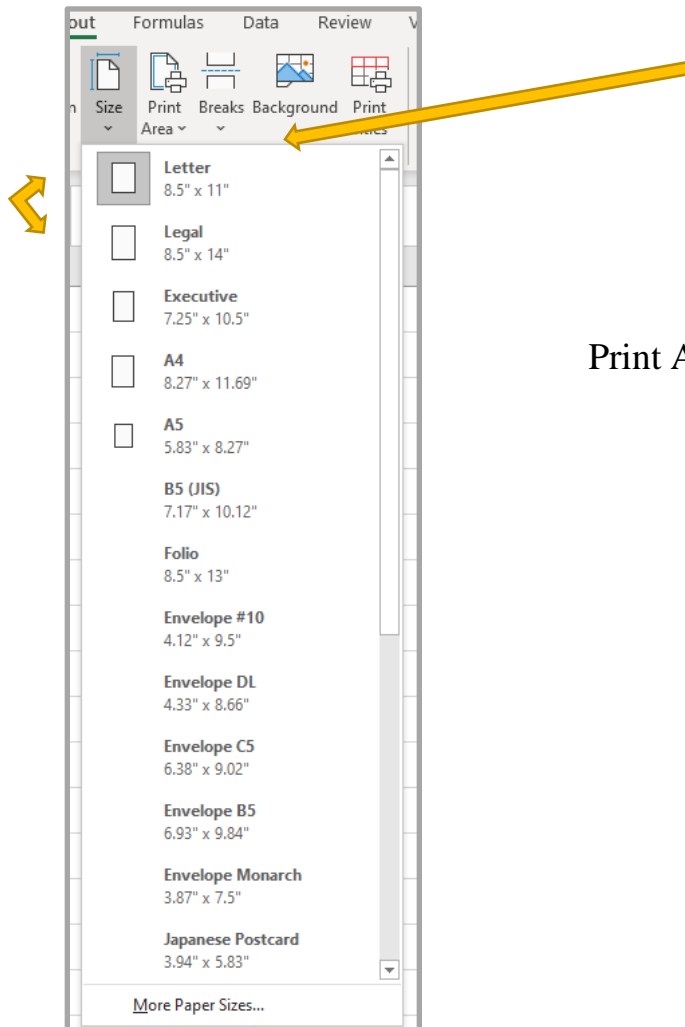


Orientation Options allow you to change from Portrait to Landscape before you get to printing.

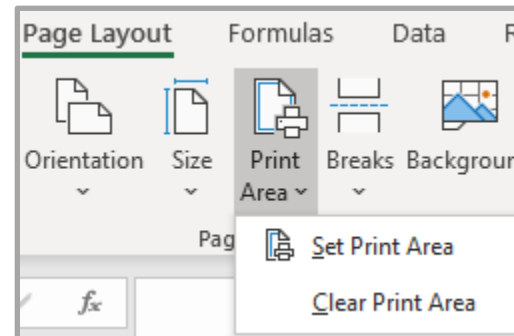


Excel Basics

Size Options allow you to change the Page size, such as Letter or Legal.

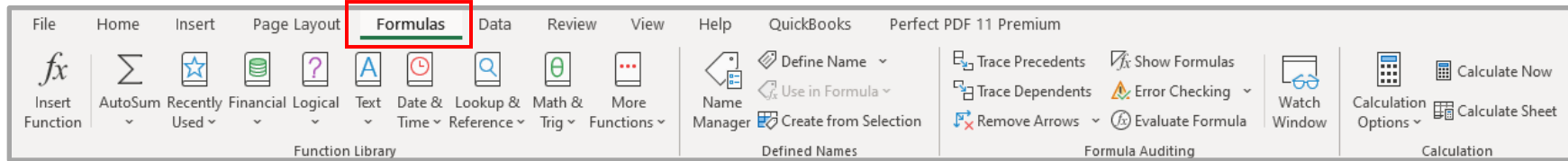


Print Area allows you to choose a smaller area for printing.

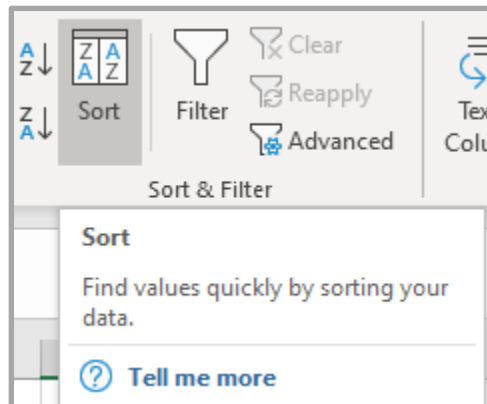


Excel Basics

Formulas Menu is designed for those of advance knowledge, therefore not included.



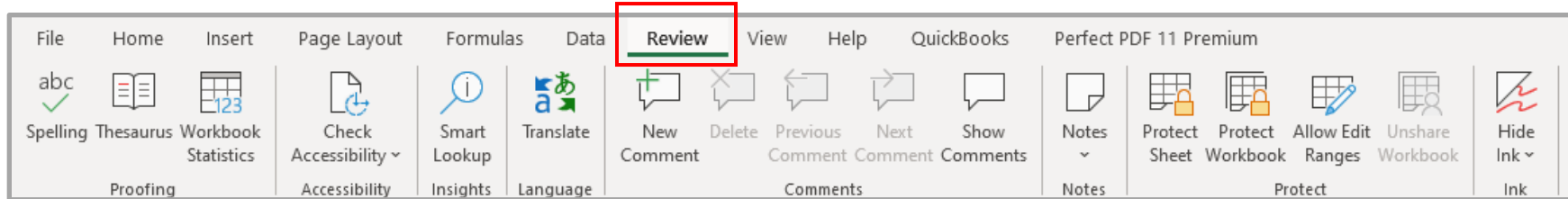
Data Menu has many options, but the most used is “Sort”.



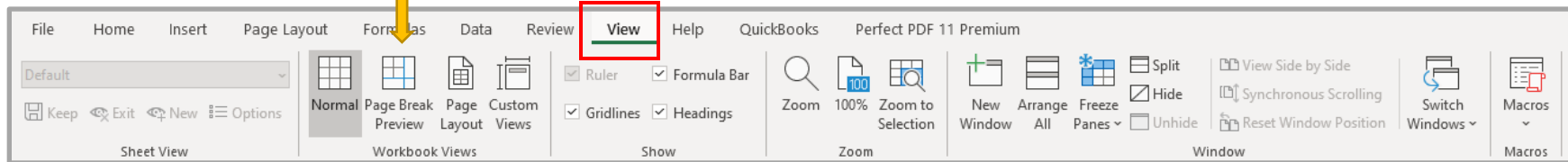
Highlight the area you would like to sort. Make sure to include all columns. If you only highlight one column the remaining columns will not sort along with the highlighted columns. Let us say you have name, address, phone number. Sorting just the name column would leave the address and phone number columns intact. If you highlight all 3 columns then the name, address and phone numbers will sort together.

Excel Basics

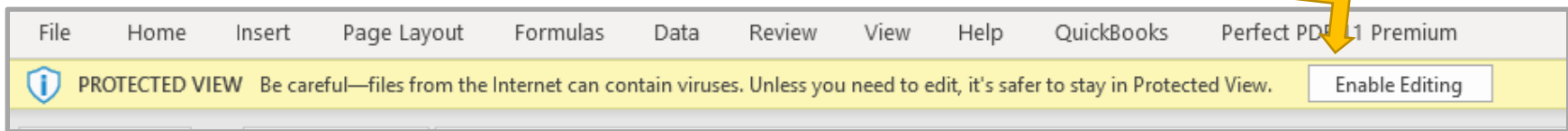
Review Menu is where you find “Spelling” and “Thesaurus”.



View Menu is used to change your view of the worksheet. Maybe you want to see how the page would look if you printed it right now. Page Break View allows this.



Quickbooks Online allows you to export to “Excel”. When you load the worksheet, the following notice appears at the top of the worksheet. You can not change the worksheet until you “Enable Editing”.



Excel Basics

MATH BASICS – Simple addition for totals.

Formula bar: $=(((B13)+(B14))+(B15))+(B16))+(B17)$

	A	B
1	Moose Lodge	
2	Profit and Loss	
3	May 2019 - April 2020	
4		
5		Total
6	Income	
7	4000.00 Dues and Fees Income	
8	4005.00 Membership Dues	124.00
9	Total 4000.00 Dues and Fees Income	\$ 124.00
10	4200.00 Sales Income	
11	4205.00 N/T Merchandise	234.26
12	Total 4200.00 Sales Income	\$ 234.26
13	4225.00 Social Quarters Sales	
14	4230.00 Beer Sales	17,214.40
15	4235.00 Liquor Sales	20,505.95
16	4245.00 Miscellaneous Mdse Sales	2,963.93
17	4248.00 Overage & shortage	-23.52
18	Total 4225.00 Social Quarters Sales	\$ 40,660.76

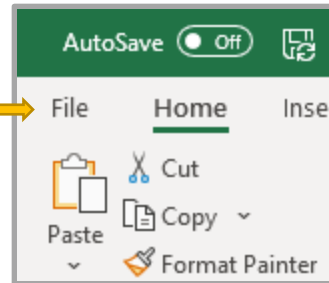
Excel Software will highlight the totals to be added together.

Formula bar: $=(((B9)+(B12))+(B18))+(B21))+(B24))+(B29)$

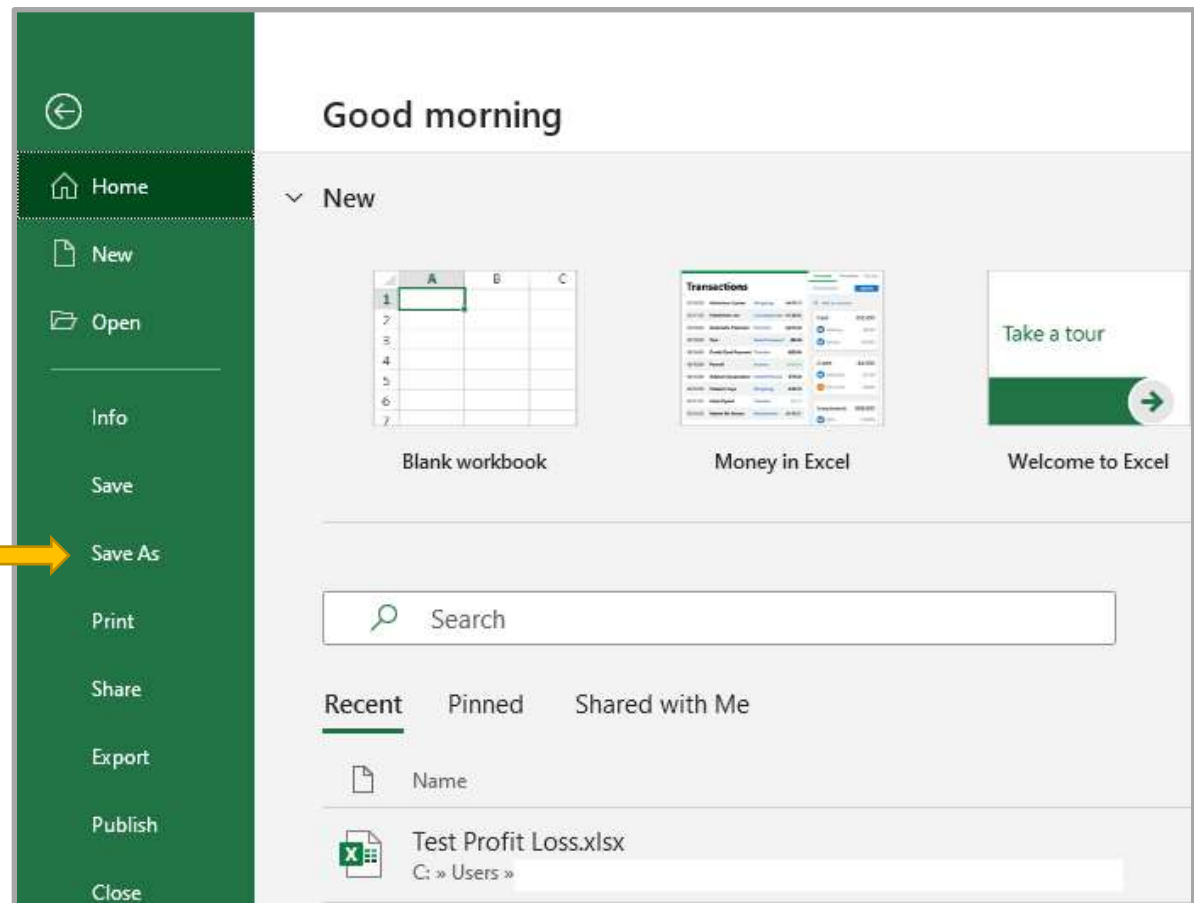
	A	B
10	4200.00 Sales Income	
11	4205.00 N/T Merchandise	234.26
12	Total 4200.00 Sales Income	\$ 234.26
13	4225.00 Social Quarters Sales	
14	4230.00 Beer Sales	17,214.40
15	4235.00 Liquor Sales	20,505.95
16	4245.00 Miscellaneous Mdse Sales	2,963.93
17	4248.00 Overage & shortage	-23.52
18	Total 4225.00 Social Quarters Sales	\$ 40,660.76
19	4250.00 Kitchen Sales	
20	4255.00 Food Sales	6,110.28
21	Total 4250.00 Kitchen Sales	\$ 6,110.28
22	4300.00 Donations Received	
23	4310.00 Member Donations	2,683.01
24	Total 4300.00 Donations Received	\$ 2,683.01
25	4600.00 Other Income	
26	4601.00 MISC INCOME	147.00
27	4605.00 Vending	113.00
28	4615.00 Hall Rental	55.00
29	Total 4600.00 Other Income	\$ 315.00
30	Total Income	\$ 50,127.31

Excel Basics

Choose “File” from the Top Menu.



“Save As” Menu will provide you existing locations. More Options allows you to search for your location.



Excel Basics

“Save As” Screen defaults to a location you might have used before. Choosing “More Options” provides a new screen with an File Explorer Window to choose a location.

