



50 MUST-KNOW EXCEL ESSENTIALS



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15 Must-Know Functions

1. SUM

Use Case: Add up total sales, expenses, or any numeric data quickly.
Example: A2:A10 contain sales numbers.
Total Sales =SUM(A2:A10)

2. AVERAGE

Use Case: Calculate the average monthly revenue from a sales dataset.
Example: B2:B13 contain monthly revenue.
Total Sales =AVERAGE(B2:B13)

3. SUMIFS

Use Case: Calculate total sales for a specific region ("West") and product ("A").

Example: A2:A10 contains product name, B2:B10 contains regions, and C2:C10 contains sale amounts.

Total Filtered Sales: =SUMIFS(C2:C10, A2:A10, "A", B2:B10, "West")

4. COUNTA

Use Case: Count non-empty cells in a range.

Example: A1:A5 contains {10; "Text"; ""; 20; #N/A}.

Non-Empty Cells: =COUNTA(A1:A5)

Result: 4 (ignores empty cells).

5. AGGREGATE

Use Case: Calculate the average value of a range of cells, ignoring errors.

Example: A1:A6 contains {10; 20; #DIV/0!; 30; 40; #N/A}. These represent a mix of valid numbers and errors.

Required Average: =AGGREGATE(1, 6, A1:A6)

Result: 25 (average of valid numbers: 10, 20, 30, and 40, while ignoring the errors).

6. IF

Use Case: Perform conditional checks, like showing "Bonus" or "No Bonus" for sales.
Example: A1 contains actual sales, and B1 contains the target sales.
Bonus or No Bonus: =IF(A1>=B1, "Bonus", "No Bonus")

7. IFERROR

Use Case: Catch errors and return a custom result – "Not Found" or blank cell.
Example: A1 contains numerator and B1 contains denominator.
Handle #DIV/0! Errors: =IFERROR(A1/B1, "") returns a blank cell instead of the error.

8. XLOOKUP

Use Case: Lookup an item and extract the price from a product dataset.
Example: A2:A10 contain product names, and B2:B10 contain price.
Price of "Apple": =XLOOKUP("Apple", A2:A10, B2:B10)

9. FILTER

Use Case: Extract data that matches criteria – Region = West & Amounts > 100.

Example: A2:A10 contains product name, B2:B10 contains regions, and C2:C10 contains amounts.

Filtered Data: FILTER(A2:C10, (B2:B10="West") * (C2:C10>100))

10. UNIQUE

Use Case: Get a list of unique product names.

Example: A2:A10 contains product names: {"Apple"; "Banana"; "Apple"; "Orange"; "Banana"; "Grapes"; "Orange"}.

Formula: =UNIQUE(A2:A10)

Result: {"Apple"; "Banana"; "Orange"; "Grapes"} (returns unique product names excluding duplicates).

11. TRIM

Use Case: Clean up extra spaces in text data.
Example: A1 contains "Peter Parker".
Cleaned Name: =TRIM(A1)
Result: "Peter Parker"

12. TEXTJOIN

Use Case: Combine first and last names into full names.
Example: A1 contains "Peter" and B1 contains "Parker".
Full Name: =TEXTJOIN(" ", TRUE, A1, B1)
Result: "Peter Parker"

13. SUBSTITUTE

Use Case: Replace old Product IDs with new ones, preserving the old ones for reference.
Example: A1 contains "ABC_123".
New Product ID - Cell B1: =SUBSTITUTE(A1, "ABC", "XYZ")
Result: B1 contains "XYZ_123" & A1 still contains "ABC_123"

14. SORT

Use Case: Sort sales data by region (A-Z) and sales (highest to lowest).

Example: A2:C6 contains sales data: {"Apple", "West", 300; "Banana", "East", 500; "Orange", "West", 400; "Grapes", "East", 450}.

Formula: =SORT(A2:C6, {2,3}, {1,-1})

Result: {"Banana", "East", 500}; {"Grapes", "East", 450}; {"Orange", "West", 400}; {"Apple", "West", 300}.

15. TEXT

Use Case: Format a date serial number to a "mmm-yy" format.

Example: A1 contains the serial date number 45239.

Formula: =TEXT(A1, "mmm-yy")

Result: Nov-24.

20 Must-Know Keyboard Shortcuts

1. Copy

Ctrl + C

2. Cut

Ctrl + X

3. Paste

Ctrl + V

4. Undo

Ctrl + Z

5. Redo

Ctrl + Y

6. Select All

Ctrl + A

7. Insert Table

Ctrl + T

8. Find

Ctrl + F

9. Find & Replace

Ctrl + H

10. Paste as Values

365 (only)
Ctrl + Shift + V

Other Versions
Ctrl + Alt + V, V

11. In-Cell Line Break

Alt + Enter

12. Edit Cell

F2
Note: Try holding the Fn key if F2 doesn't work on its own

13. Jump to the edge of the data range

Ctrl + ↓
Note: Use other arrow keys to jump in their corresponding direction

14. Select Till Non-Empty Cell Below

Ctrl + Shift + ↓
Note: Use other arrow keys to select cells in the corresponding direction

15. Show Formulas

Ctrl + `

16. Auto-Fit Column Width

Alt, H, O, I

17. Apply Currency Format

Ctrl + Shift + \$

18. Hide Rows

Ctrl + 9

19. Hide Columns

Ctrl + 0

20. Today's Date

Ctrl + ;



Don't stop here, grab all 239 Excel shortcuts in one place!!
Psst... 🍏 shortcuts included...

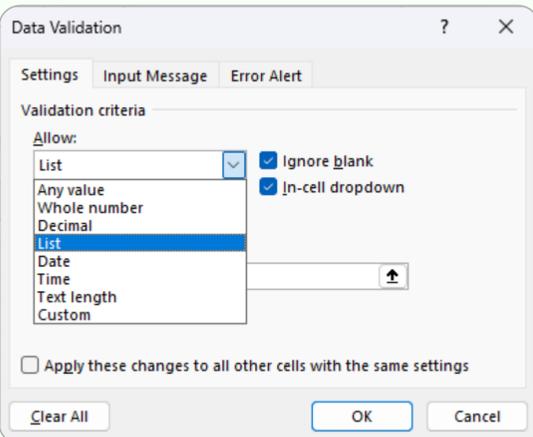
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7 Must-Know Data Validation Techniques



1

Drop-down Lists: (Data tab > Data Validation > List)

Use Case: Create a list of permitted options users can select from.

2

Data Validation Rule: (Data tab > Data Validation)

Use Case: Limit allowable data types to Whole Number, Date, Specified Text Length, etc.

3

Create Dynamic Lists: (Data tab > Data Validation > List)

Use Case: Auto-update drop down lists as new entries are added.
How To: Insert =OFFSET(\$A\$1, 0, 0, COUNTA(\$A\$1:\$A\$100), 1) in the Source box where list starts in cell A1.

4

Custom Validation Formulas: (Data tab > Data Validation > Custom)

Use Case: Ensure only numbers are entered in a cell.
How To: Insert =ISNUMBER(A1) in the Formula box, and it will get auto-applied to all cells in the selected cell.

5

Limit Decimal Places: (Data tab > Data Validation > Decimal)

Use Case: Ensure numeric entries are limited to a certain number of decimal places.

6

Date Range Validation: (Data tab > Data Validation > Date)

Use Case: Limit data entry to a specific date range, for e.g., dates between 1/1/2024 & 12/31/2024

7

Restrict Duplicate Entries: (Data tab > Data Validation > Custom)

Use Case: Prevent duplicates in a list
How To: Insert =COUNTIF(A:A, A1)=1 in the Formula box. If the count exceeds 1, the formula evaluates to FALSE, showing error & preventing the duplicate entry in column A.

Benefits

1. Consistent data entry
2. Simplified data entry
3. Enhanced accuracy
4. Reduced formatting
5. Custom error alert messages on incorrect data entry guide users

8 Must-Know Formatting Hacks

1. Tables

Use Case: Automatic formatting and filter buttons.
How To: Home > Format as Table

2. Wrap Text

Use Case: Ensure long text fits within a cell by wrapping it.
How To: Home > Wrap Text

3. Cell Styles

Use Case: Apply pre-designed styles to cells for a consistent look.
How To: Home > Cell Styles

4. Format Painter

Use Case: Copy formatting from one cell to another.
How To: Home > Format Painter

5. Apply Themes

Use Case: Change the overall look and feel of your spreadsheet by applying a theme.
How To: Page Layout > Themes

6. Center Across Selection

Use Case: Add a title to your data centered across the columns A to D, without merging cells.
How To: Home > Alignment > Horizontal dropdown > Center Across Selection.

7. Conditional Formatting

Use Case: Highlight cells based on their values (e.g., color-code high and low sales)
How To: Home > Conditional Formatting

8. Custom Number Formats

Use Case: Create custom number displays (e.g., showing phone numbers with parentheses).
How To: Home > Number > More Number Formats

