

# Excel for Accounting

GoSkills online course syllabus

Thursday, May 1, 2025

## Skill level

Beginner

## Lessons

34

## Accredited by

CPD

## Pre-requisites

None

## Video duration

3h 13m

## Estimated study time

18h for all materials

## Instructors

Lydia Uys

Dan Gorgone

## Introduction

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1

### Introduction

A quick introduction to the course.

## Getting Data in Workable Format in Excel

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### Importing Data into Excel: Fixing Text and Numbers

How to recognize when text and numbers imported incorrectly and how to use TRIM and FIND and REPLACE to fix errors.

3

### Importing Data into Excel: Fixing the Date

Use the text to columns button to separate the different parts of the date and the DATE function to put it back together as a proper date.

4

### Importing Data into Excel: Get Rid of Blank Lines in Your Data

The video shows two different ways to get rid of blank lines in a dataset and how to sort data without unique identifiers back into its original order.

## Working with a Range of Data

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5

### Conditional Formatting: Using the Icons

This lesson illustrates the basic options of conditional formatting with 4 different examples.

6

### Conditional Formatting: Manage Rules and Use Formulas in Rules

What if the conditional formatting menu options do not cater to what I want? Let's look at how to customize conditional formatting by way of creating a dynamic To-Do list.

- 7 Data Validation: Preventing Garbage Input**  
We look at how to use basic data validation techniques to reduce garbage input and avoid errors.
- 8 Data Validation: Create a Dropdown List**  
In this lesson, we look at how to use data validation to create a dropdown list in Excel to limit input to pre-set options.
- 9 Auto Filters: Display Records That Meet a Certain Criterion**  
In a dataset, use auto filters to extract lists based on text or date criteria. Let's look at how to sort using auto filters.
- 10 Auto Filters: Combined with Conditional Formatting**  
We examine how to filter using numerical criteria, conditional formatting, identify duplicate items, and use SUBTOTAL to add values in a filter.
- 11 Grouping Data: Create Your Own Collapsible and Extendible Sections**  
How to group data, and add your own expandable and collapsible sections to hide and unhide portions of data.
- 12 Grouping Data: Remove Groupings, Fix Borders and Copy Visible Data**  
Let's look at how to remove created groupings, copy only visible data, and fix borders on cells to work with grouping.

## Functions in Excel

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- 13 Text Functions**  
In this lesson, we learn how to use LEN, FIND, SEARCH, LEFT, RIGHT and MID.
- 14 Text Functions: Combine**  
In this lesson, we'll use LEN, FIND, SEARCH, LEFT, RIGHT, and MID in combination to sort out more complex issues.
- 15 Date Functions: Understanding How Dates Work**  
We learn how to use dates as serial numbers, TODAY(), EOMONTH, WORKDAYS, and NETWORKDAYS.
- 16 Time: Using Time in Calculations**  
We examine a timesheet and a payroll calculation to illustrate time as part number, how to format time, and how to calculate gross pay based on time and an hourly rate.
- 17 Logic Functions: Using Logic to Supply TRUE or FALSE as a Result**  
We'll look at logic functions, including: >, <, =, <>, AND and OR. We also test single or double criteria, and illustrate the MONTH function.
- 18 IF and IFS Functions: If You Want a Specific Result to a Logic Test**  
In this lesson, we learn the basic uses of IF and IFS and how to combine it with AND()/OR().

- 19** **Conditional Math: Calculations Based on a Single Column Criterion**  
In this lesson, we learn the basic uses of SUMIF() and COUNTIF().
- 20** **Conditional Math: Calculations Based on Multiple Columns as Criteria**  
Let's look at how to use SUMIFS and COUNTIFS to calculate based on more than one criterion column and add numbers per month.
- 21** **Lookups: VLOOKUP and HLOOKUP**  
Let's learn the basic uses of VLOOKUP and HLOOKUP by building your own invoice template.
- 22** **Lookups: INDEX and MATCH**  
In this lesson, we learn the basic uses of INDEX and MATCH by building your own invoice template.
- 23** **Lookups: XLOOKUP**  
In this lesson, we learn the basic uses of XLOOKUP by building your own invoice template.
- 24** **Lookups: Approximate Search for all Lookups**  
How does an approximate lookup work? We look at one example to show VLOOKUP, INDEX & MATCH and XLOOKUP.

## Extracting, Combining and Reporting Data

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- 25** **Tables: How to Convert Data into a Table**  
We learn about prepping data for a table, converting the data to a table, and the benefits of a table.
- 26** **Structured References in Tables**  
What's up with the funny formula references in tables? What does it mean and how does it work?  
We learn the basics of using structured references.
- 27** **Power Query: Alternative Way to Get Data Into Excel**  
What are the basics you have to check when you use Power Query? We learn how to get data into Excel in a much more effective manner than copy and paste.
- 28** **Pivot Tables: Analyze Data Quick and Easy**  
We learn the basics of a pivot table, how to create a pivot, refresh and format.
- 29** **Charts: Basics**  
In this lesson, we examine how to create a chart, chart elements, and format elements.
- 30** **Prepare to Print**  
Learn how to prepare your file to be printed, page break previews, page layout options, and headers and footers.

# Create Your Own Calculators for Tax and Debt

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## 31 Repayment Calculator: Calculate Payments

In this lesson, we calculate payments (PMT) using financial functions.

## 32 Repayment Calculator: Create an Amortization Table

Learn how to create an amortization table to show the interest and balances for each period.

## 33 Tax Calculator: Understanding a Tax Scale

In this lesson, we learn how to use Excel formulas to calculate your tax liability.

## 34 Tax Calculator: Create Your Own

In this lesson, we create a lookup table and use lookup formulas to calculate tax liability.

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