goskills

Excel for Accounting

GoSkills online course syllabus

Saturday, April 20, 2024

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

1 Introduction

A quick introduction to the course.

Getting Data in Workable Format in Excel

2 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

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

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 SUMFIS 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

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

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.

Go to GoSkills.com