

Excel for Finance

GoSkills online course syllabus

Skill level

Beginner

Lessons

17

Pre-requisites

No prior experience needed

Video duration

1h 6m

Estimated study time

1h 6m

Instructor

Steve Friedman

Introduction

1 Why Excel

With all of the technologies and softwares available today for those working in a finance role, you might be wondering why Excel is worth considering as your primary tool.

Your Excel Toolkit

2 Absolute and relative references

Mastering absolute and relative references is one of the most important steps to mastering Excel.

3 Using references to build spreadsheets

Absolute and relative references can be used to build large, complex spreadsheets very quickly.

4 Financial functions

Excel has built-in functionality around many financial instruments, which automates calculations surrounding them.

5 Date functions

The way Excel handles dates can be confusing, but there are a few effective tricks you can use to work with them with ease.

6 Using XLOOKUP

XLOOKUP is one of the most powerful tools in Excel.

7 Using VLOOKUP

VLOOKUP is the older version of XLOOKUP, and although XLOOKUP is generally superior, VLOOKUP is far more commonly used.

8

Pivot tables

Pivot tables are an Excel tool to summarize data rapidly.

Unlocking Excel's Power for Finance

9

COUNTIF and SUMIF

COUNTIF and SUMIF are formulas to count or add up values that meet specific criteria.

10

COUNTIFS and SUMIFS

COUNTIFS and SUMIFS allow you to count or add up values with more specificity.

11

SUMIF(S) for finance

SUMIF is especially useful for finance, as it allows you to automate the process of adding up costs or revenues by category.

12

Building a cash forecast

One of the most vital tasks for a financial analyst is ensuring there will be enough operating cash going forward.

13

Forecasting financial health

Financial analysts often project a business's revenue, income, and overall financials.

14

Filters for finance

Using Excel filters will cut down the time you spend looking for specific pieces of financial data.

Continuing your Excel journey

15

Excel best practices

Excel offers a ton of tools and formulas, but many of them can be touchy, cause problems, or break your spreadsheets.

16

Common problems and troubleshooting

Sometimes things go wrong in Excel, so it's important to course correct when needed.

Conclusion

17 Begin your Excel journey

Thank you for watching this course!

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