

Excel Lists and Databases

Melissa P Esquibel, MCT

MelissaEMCT.com

BusinessManagement
DAILY

Roadmap

- What is a well-built list?
- Essential List Tools
- Beyond Basic List Tools
- Imported Lists



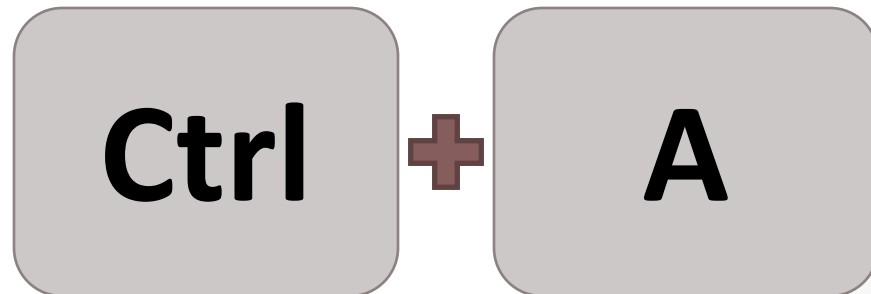
What is a well-built list?

- Column Titles
- One row-one record
- No completely blank rows
- No completely blank columns
- Consistent data types



What if my list isn't ideal?

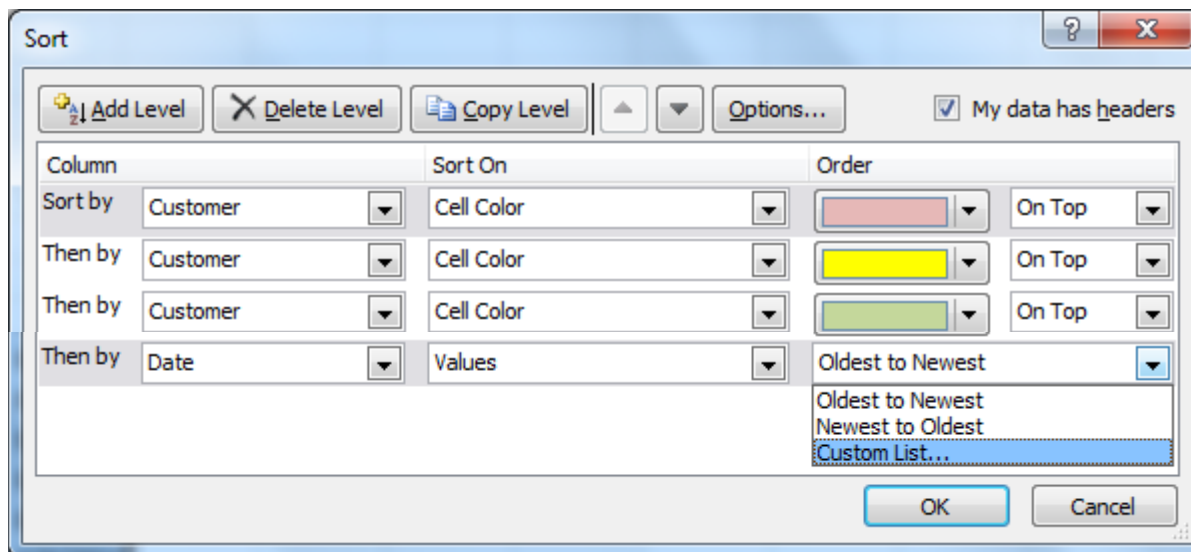
- Delete blanks, but TEST!
- Alternatives to blank rows and columns
- Quick fixes to multiline data
- Copy/Paste Transpose



Sort

- Basic Sort
- By color
- By custom list

Alt , D , S



Filter



- Basic Filter
- By color
- “Or” criteria
- “And” criteria

The screenshot shows the Excel interface with a data table and the 'Text Filters' dialog box open. The table has columns A, B, C, and D. Column B is highlighted in yellow and contains a dropdown menu with 'Customer' selected. Columns C and D are labeled 'Qtr 1' and 'Qtr 2' respectively. The data rows show values like '\$ -', '\$ 600.0', '\$ 1,123.20', '\$ -', '\$ -', '\$ 1,560.0', '\$ 920.0', '\$ -', '\$ 877.5', '\$ -', '\$ -', '\$ -', '\$ -', '\$ 544.00', and '\$ -'. The 'Text Filters' dialog box is open over column B, showing a search field and a list of criteria with checkboxes. The criteria include '(Select All)', 'ALFKI', 'ANATR', 'ANTON', 'AROUT', 'BERGS', 'BLAUS', 'BLONP', 'BOLID', and 'BONAP'. A large red 3D-style text overlay reads '<OR AND>'. The 'Custom Filter...' option is highlighted in the dialog box.

A	B	C	D
	Customer	Qtr 1	Qtr 2
		\$ -	\$ -
		\$ -	\$ 600.0
		\$ 1,123.20	\$ -
		\$ -	\$ -
		\$ -	\$ 1,560.0
		\$ -	\$ 920.0
		\$ -	\$ 877.5
		\$ -	\$ -
		\$ -	\$ -
		\$ -	\$ -
		\$ -	\$ -
		\$ 544.00	\$ -
		\$ -	\$ -

Subtotal

- What did you sort by? →
- What kind of math? →
- What do you want to do the math to? →

Subtotal

At each change in:
Customer

Use function:
Sum

Add subtotal to:
 Customer
 Qtr 1
 Qtr 2
 Qtr 3
 Qtr 4
 Date

Replace current subtotals
 Page break between groups
 Summary below data

Remove All OK Cancel

Beyond Sort/Filter/Subtotal

- Advanced Filter
- DFunctions

Criteria

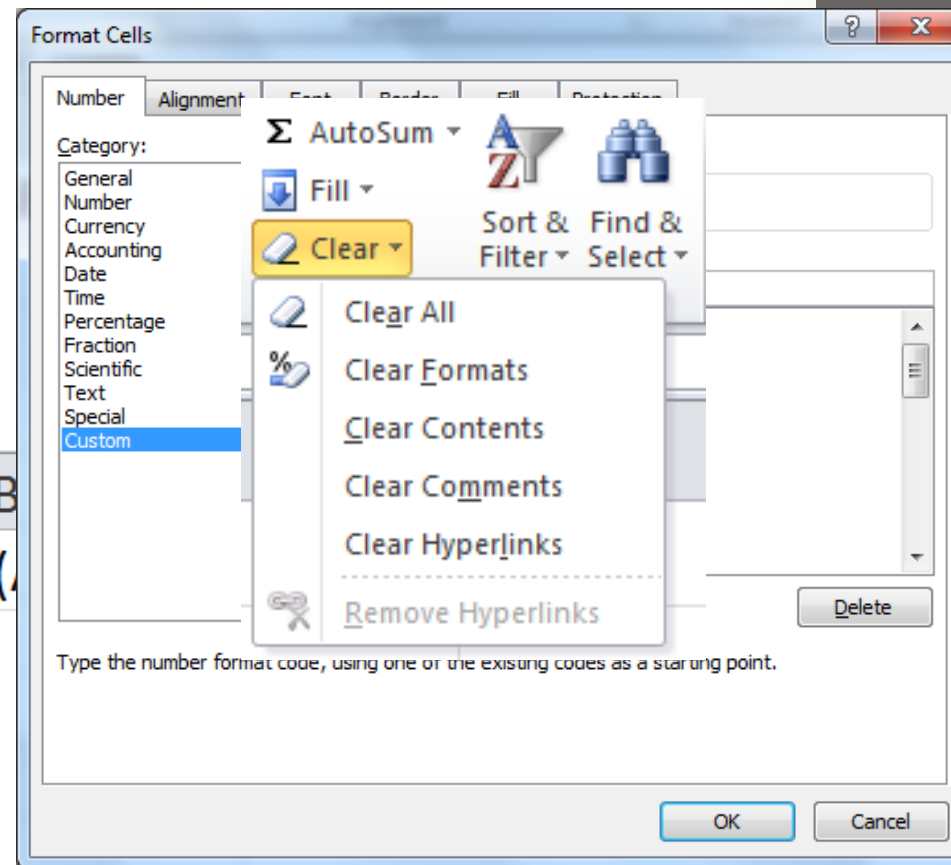
	A	B	C	D	E	F	G
1	Product	Customer	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Date
2		ANTON		>100			
3		BERGS		>100			
4							
5	=DSUM(A6:G283,D6,Criteria)						
6	Product	Customer	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Date
10	Alice Mutton	ANTON	\$ -	\$ 702.00	\$ -	\$ -	5/27/2012
11	Boston Crab Meat	ANTON	\$ -	\$ 165.60	\$ -	\$ -	6/10/2012
12	Ipoh Coffee	ANTON	\$ -	\$ 586.50	\$ -	\$ -	9/6/2012
15	Sasquatch Ale	ANTON	\$ -	\$ 560.00	\$ -	\$ -	12/4/2012
21	Boston Crab Meat	BERGS	\$ -	\$ 920.00	\$ -	\$ -	5/26/2012
26	Ipoh Coffee	BERGS	\$ -	\$ 2,760.00	\$ -	\$ -	9/7/2012

Database

Data Import & Clean Up

- Data Text-to-Columns
- Text Functions
- Remove Duplicates
- Number Formatting
- Date Formatting

	A	B
1	ABCD1234V99	=LEFT(



Question & Answer Session

- Have a question for the speaker? Press “star” and then “1” on your phone to enter the queue.
- If, during the Q&A, your question has been answered, or you wish to remove yourself from the queue, press “star” and then “1”.
- The moderator will open your line when it is your turn to speak.
- For more information regarding Business Management Daily’s newsletters, forums, webinars and special reports, visit:
www.BusinessManagementDaily.com
- We’d love your feedback regarding the conference and other topics you’d like to hear about! Contact Josh Strohecker at:
jstrohecker@BusinessManagementDaily.com

Thank you for Participating!

Thank You!

After the program:

melissa@esquibel.me

MelissaEMCT.com/contact

BusinessManagement
DAILY