NACM'S 129TH
CREDIT CONGRESS & EXPO *Cleveland*
MAY 18-21, 2025

Excel Essentials for Credit Managers

Toolkit **#1**

Presented by: **SHERI TINGLE**

May 20, 2025 ⬧ 3:45 - 5 PM

Session **#37055**

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Toolkit #1 Outline

Data Entry & Formatting Essentials

1. AutoFill Patterns
2. Fill Handle Custom Lists
3. Flash Fill
4. Text to Columns
5. Conditional Formatting

Basic Data Organization & Structure

1. Freeze Panes
2. Sorting
3. Filtering
4. Go To Special

Essential Functions for Data Analysis

1. AUTOSUM   2. IF   3. COUNTIFS   4. SUMIFS

Rules of Math

RULES OF MATH

=SUM(B3:P47)

1. Always begin with an **equal sign =**
2. Function **name**
3. Open **parenthesis (**
4. Include **arguments**
5. Close **parenthesis)**

Rules of Math

- Can use real numbers, cell addresses, range names
- NO spaces
- NO % signs, 50% typed as .5
- Text must be enclosed in " "
- Follow the rules of math—**PEMDAS**
  Please **E**xcuse **M**y **D**ear **A**unt **S**ally
  Parenthesis, **E**xponentiation,
  Multiplication, **D**ivision, **A**ddition,
  Subtraction
- Use $ to represent an absolute value

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NESTED FUNCTIONS: IF Grading Example	
A = 90-100%	A nested function includes more than one function
B = 80-89%	
C = 70-79%	
D = 60-69%	
Student 1	97%	=IF(B7>=0.9,"A",IF(B7>=0.8,"B",IF(B7>=0.7,"C",IF(B7>=0.6,"D","F"))))
Student 2	30%	F
Student 3	81%	B
Student 4	92%	A
Student 5	63%	D

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