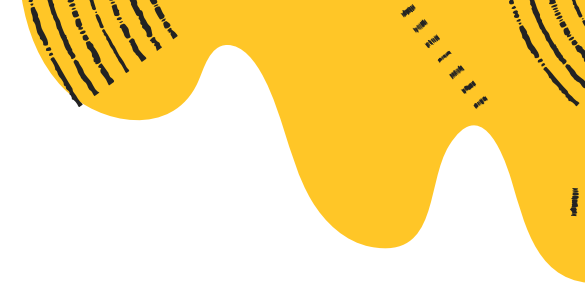


# EXCEL FOR DAILY LIFE: BUDGETING & INVOICING

Maria Luisa de la Puerta



# TODAY'S HIGHLIGHT

- Why Excel?
- What can we use excel for?
- Excel Basics
- Exercises



# INTRODUCTION

Excel is a spreadsheet software program developed by Microsoft. It allows users to create, organize, and analyse data using **rows** and **columns** in a grid format.

It is used for tasks like data organization, analysis, calculation, and visualization.

It's versatile and widely applicable in fields ranging from business and finance to education and personal life.



# IMPORTANCE OF EXCEL IN OUR DAILY LIFE

## Budgeting and Financial Tracking:

- Creating and managing personal budgets, track income and expenses, Calculating and visualizing savings, etc.

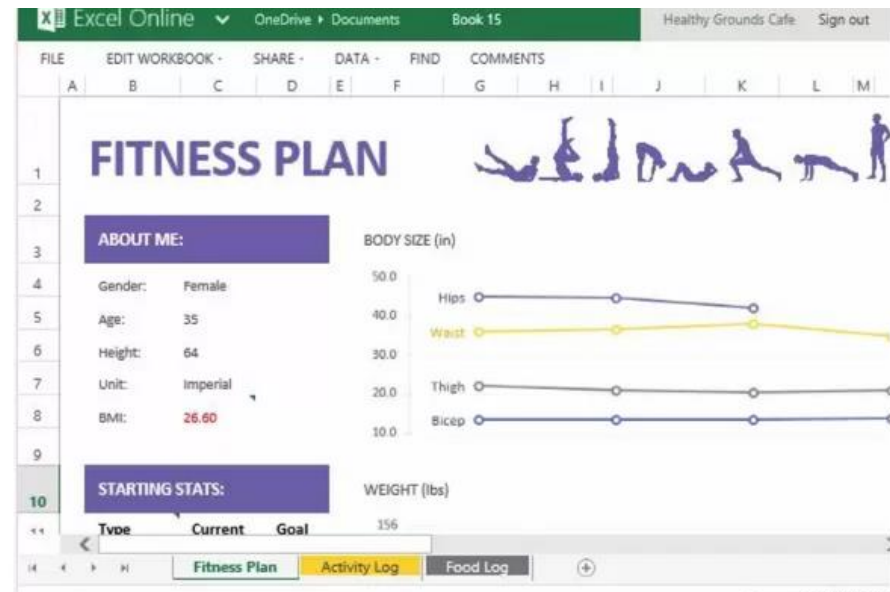
## Timetables, schedules & plans

- Course schedule, fitness plans, meal plans

## Home inventory

## Event planning

- Managing guestlists, expenses



# IMPORTANCE OF EXCEL IN OUR DAILY LIFE

## Small businesses & freelance work

- Managing finances, invoices, and expenses for small businesses.
- Inventory management and order tracking.

## Personal goal setting

## Travel Planning



Destinations		Transportation		
To	Mode	Depart	Arrive	
Cape Town	Airplane	11:20		Round
Cape Town			18:10	
Cape Town				
Stellenbosch				
Stellenbosch				
Mhondoro Game Lodge	Airplane	6:20	8:25	Flight from C
Mhondoro Game Lodge				
Mhondoro Game Lodge				
Johannesburg				

# BASICS





# BASIC INTERFACE OF THE EXCEL INTERFACE

The screenshot displays the Microsoft Excel application window. The title bar shows 'Excel' and the user's name 'Maria Luisa de la Puerta Fernandez'. The interface is divided into several sections:

- Left Navigation Panel:** Contains 'Excel', 'Home', 'New', 'Open', 'Account', 'Feedback', and 'Options'.
- Header:** Displays 'Good morning'.
- New Section:** Offers various templates for creating new workbooks, including 'Blank workbook', 'Welcome to Excel', 'Formula tutorial', 'PivotTable tutorial', 'Gantt project planner', 'Simple Gantt chart', and 'Weekly schedule planner'. A 'More templates' link is also present.
- Search:** A search bar is located below the 'New' section.
- Recent Section:** Lists recently opened files with columns for 'Name' and 'Date modified'. A large blue arrow points to this section.

Name	Date modified
Data Lacuna Drop down Deon Latest Desktop » Am Dro Consulting » Omeva Consulting » Clients » farm4trade » EIT » Lacuna	Thu at 16:50
Data Lacuna Drop down Deon Latest Downloads	Thu at 10:25
SMARTsilage about your first cut Downloads	
FINANCIAL REPORTING year 2 Desktop » Am Dro Consulting » Omeva Consulting » Clients » ruforum » GLs samples	Tue at 12:10
RUFORUM - GL Desktop » Am Dro Consulting » Omeva Consulting » Clients » ruforum » GLs samples	Tue at 12:04
Book1 Desktop » Ash Omeva	25 October



# BASIC INTERFACE OF THE EXCEL INTERFACE

The screenshot displays the Microsoft Excel 'New' interface. On the left is a green sidebar with navigation options: Excel, Home, New, Open, Account, Feedback, and Options. The main area shows a grid of templates under the heading 'New'. The templates include:

- Take a tour (Welcome to Excel)
- Get started with Formulas (Formula tutorial)
- Make your first PivotTable (PivotTable tutorial)
- Gantt project planner
- Simple Gantt chart
- Weekly schedule planner
- Milestone infographic tim...
- Inventory list with highlig...
- Basic business invoice
- Invoice (worksheet)
- Milestone and task project...
- Any year calendar (single...
- Employee absence schedule
- Sales invoice tracker
- Project tracker
- Marketing Plan Data
- Timesheet
- EXPENSE REPORT
- ACTUAL vs BUDGET PFD

The top of the window shows the user name 'Maria Luisa de la Puerta Fernandez' and standard window controls. The bottom of the image shows the Windows taskbar with the search bar, system tray, and date/time (10:00, 07/11/2023).

A1				
	A	B	C	
1				
2				
3				
4				

C3				
	A	B	C	
1				
2				
3				
4				

# Basic Excel Functions

## 1. SUM Function:

Adds up all the numbers in a range.

Example: `=SUM(A1:A10)`

## 2. AVERAGE Function:

Calculates the average of a range of numbers.

Example: `=AVERAGE(B1:B20)`

## 3. MAX Function:

Returns the largest number in a set of values.

Example: `=MAX(C1:C15)`

## 4. MIN Function:

Returns the smallest number in a set of values.

Example: `=MIN(D1:D12)`

# EXERCISE

You have worked for a company organising an event during the weekend.

You are going to charge as a freelancer using your personal details.

You are going to add other expenses to the invoice in a second sheet







# EXERCISE

We are going to do a personal budget based for a student

We are going to do a personal project budget: an event, exhibition, demonstration day



# SUM FUNCTION

**Step 1:** In the Formulas tab, click the “math & trig” option, as shown in the following image

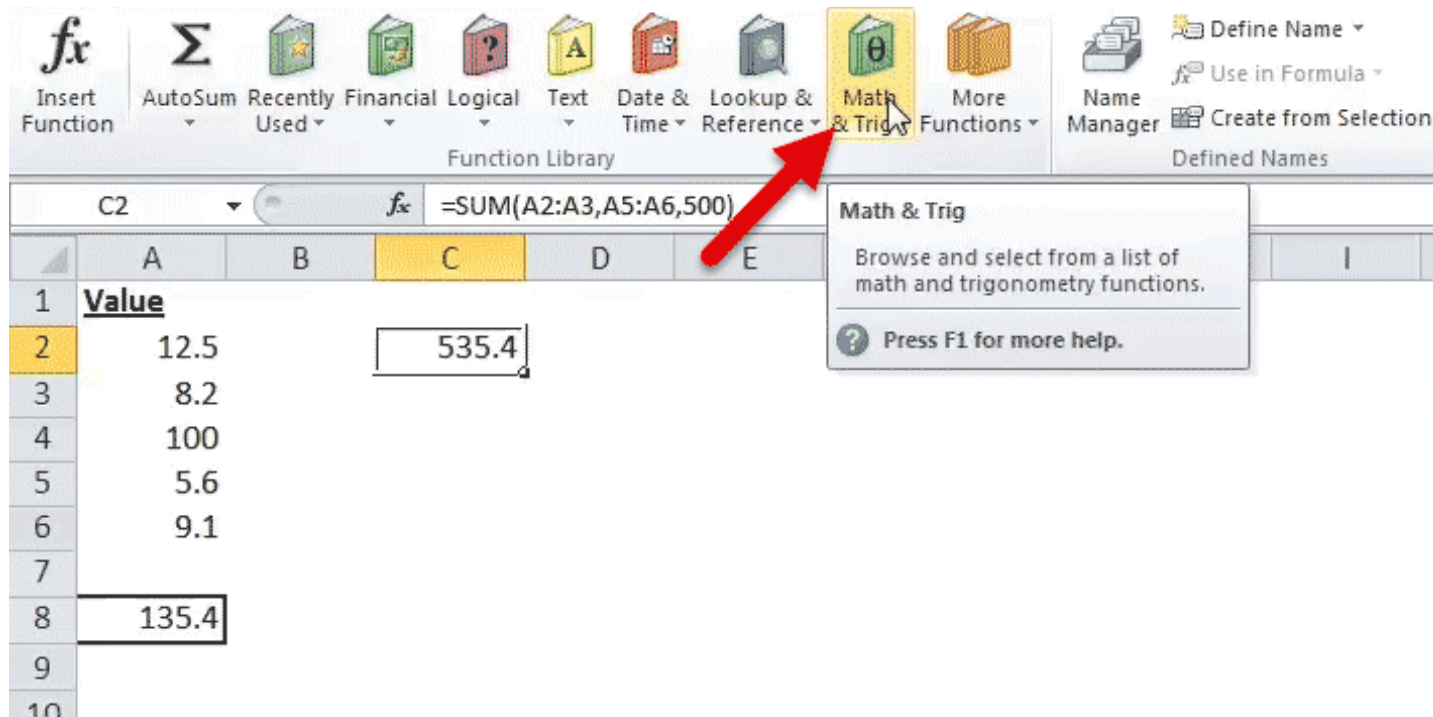
The screenshot shows the Microsoft Excel ribbon for the Formulas tab. The 'Math & Trig' function category is highlighted with a red arrow. A dropdown menu is open for 'Math & Trig', displaying the text 'Browse and select from a list of math and trigonometry functions.' and a help icon with the text 'Press F1 for more help.'

The spreadsheet below shows a sum formula in cell C2: `=SUM(A2:A3,A5:A6,500)`. The values in column A are 12.5, 8.2, 100, 5.6, and 9.1. The result in cell C2 is 535.4. Cell C8 contains the value 135.4.

	A	B	C	D	E	I
1	<b>Value</b>					
2	12.5		535.4			
3	8.2					
4	100					
5	5.6					
6	9.1					
7						
8	135.4					
9						
10						

# SUM FUNCTION

**Step 2:** From the drop-down menu that opens, select the SUM option.



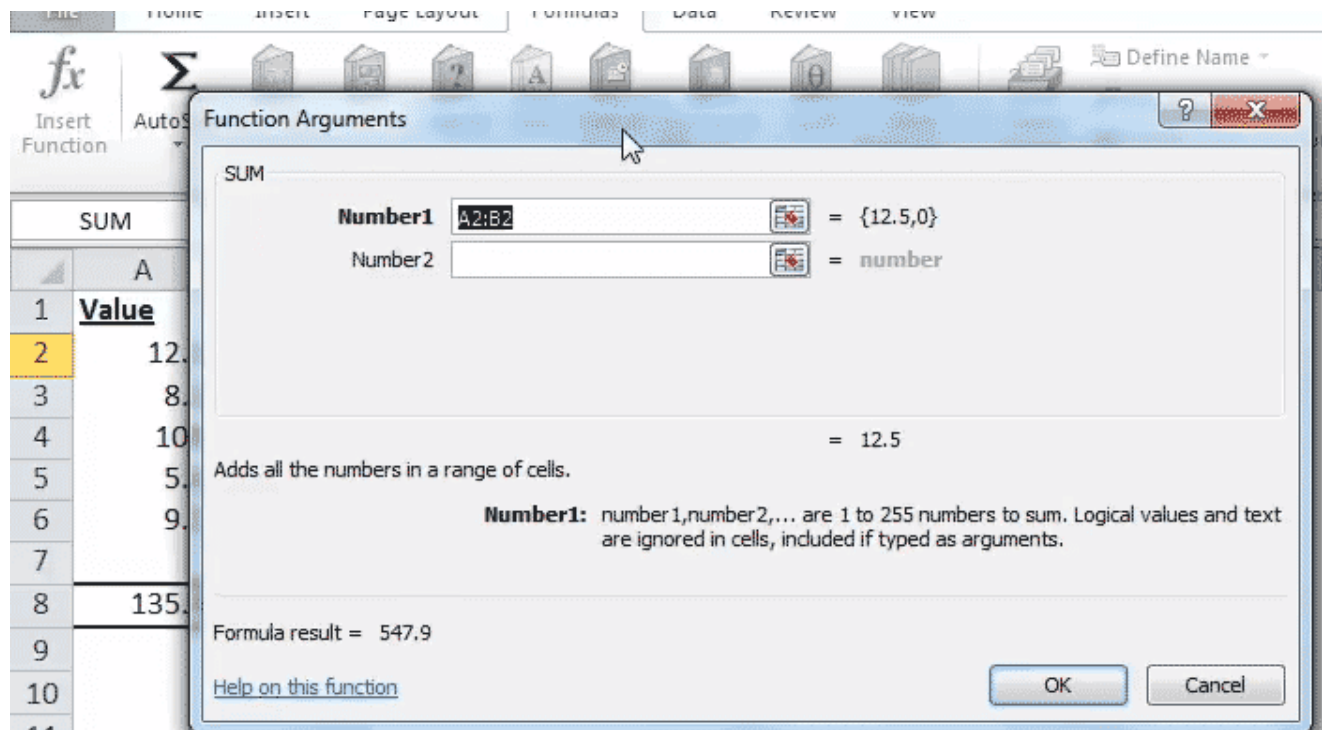
The screenshot shows the Microsoft Excel interface. The 'Insert Function' dialog box is open, and the 'Math & Trig' category is selected. The spreadsheet below shows a list of values in column A and their sum in cell C8.

	A	B	C	D	E	I
1	<b>Value</b>					
2	12.5		535.4			
3	8.2					
4	100					
5	5.6					
6	9.1					
7						
8	135.4					
9						
10						



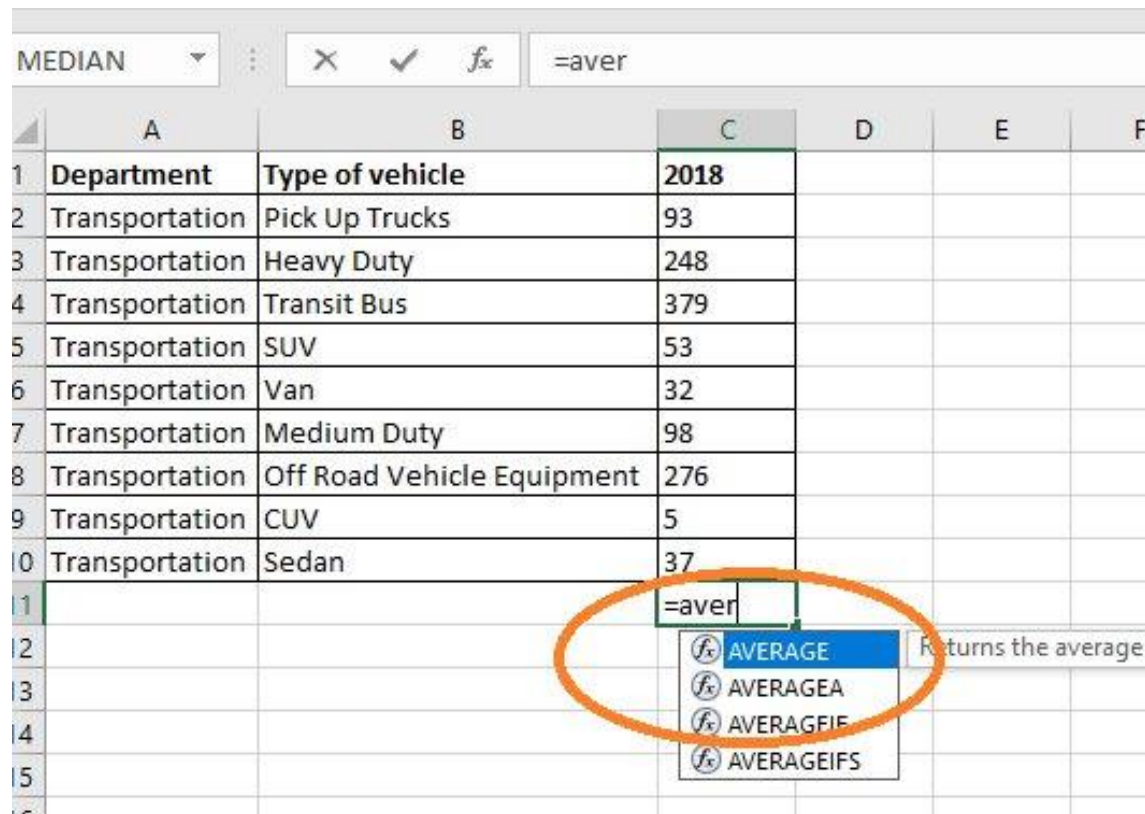
# SUM FUNCTION

**Step 3:** In the “function arguments” dialog box, enter the arguments of the SUM function. Click “Ok” to obtain the output.



# AVERAGE FUNCTION

**Step 1:** Start writing =AVERAGE( in the cell where you want the result to appear.



The screenshot shows an Excel spreadsheet with a data table and a function dropdown menu. The data table has columns for Department, Type of vehicle, and 2018. The function dropdown menu is open, showing the AVERAGE function selected.

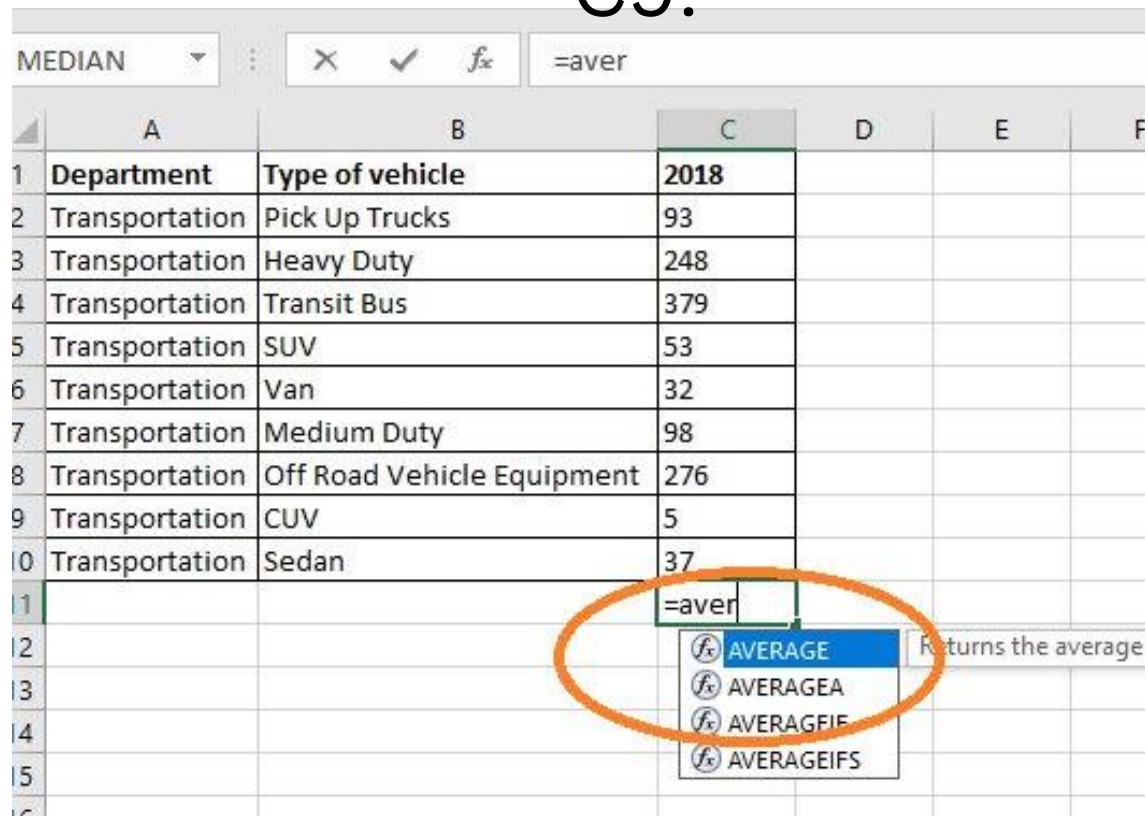
	A	B	C	D	E	F
1	Department	Type of vehicle	2018			
2	Transportation	Pick Up Trucks	93			
3	Transportation	Heavy Duty	248			
4	Transportation	Transit Bus	379			
5	Transportation	SUV	53			
6	Transportation	Van	32			
7	Transportation	Medium Duty	98			
8	Transportation	Off Road Vehicle Equipment	276			
9	Transportation	CUV	5			
10	Transportation	Sedan	37			
11			=aver			
12						
13						
14						
15						

Function dropdown menu options:

- AVERAGE (Returns the average)
- AVERAGEA
- AVERAGEIF
- AVERAGEIFS

# AVERAGE FUNCTION

**Step 2:** Select the data you want to add. In this case, the selected cell numbers are from C2 to C9.



The screenshot shows an Excel spreadsheet with the following data:

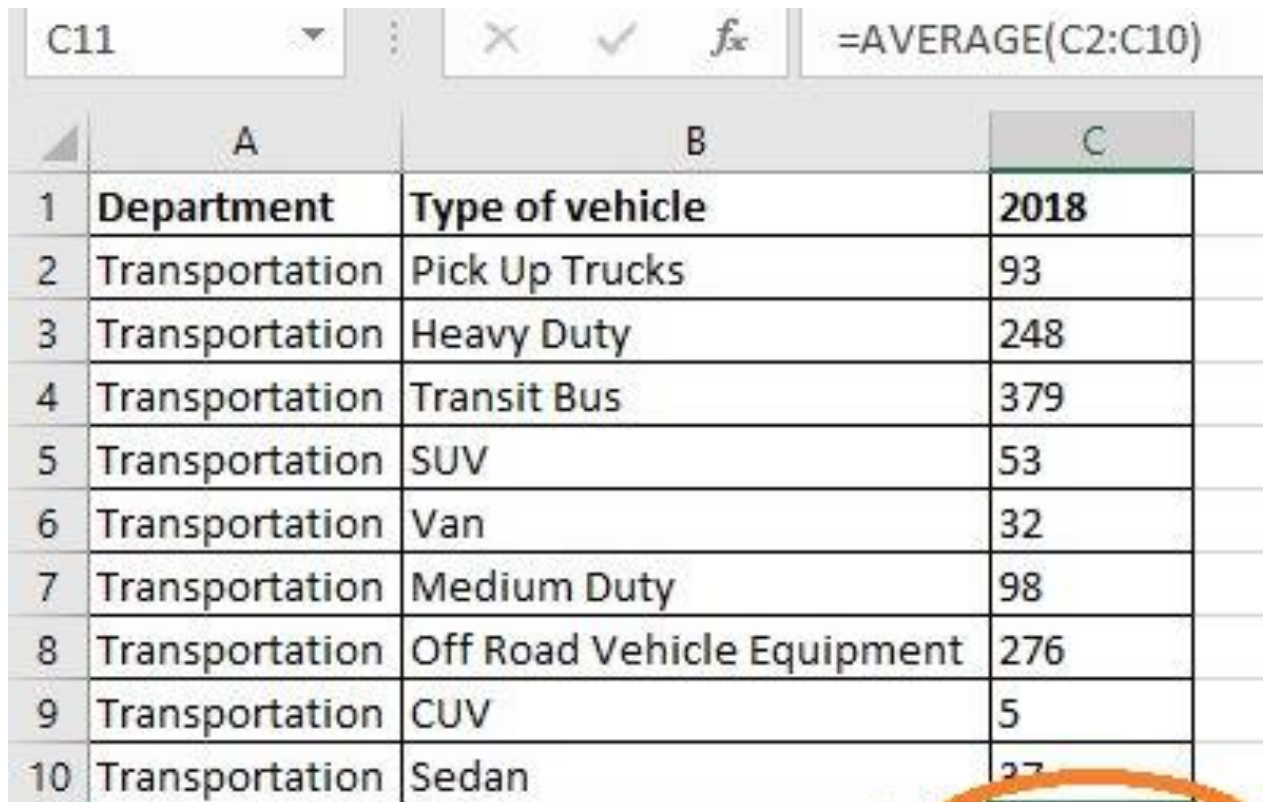
	A	B	C	D	E	F
1	Department	Type of vehicle	2018			
2	Transportation	Pick Up Trucks	93			
3	Transportation	Heavy Duty	248			
4	Transportation	Transit Bus	379			
5	Transportation	SUV	53			
6	Transportation	Van	32			
7	Transportation	Medium Duty	98			
8	Transportation	Off Road Vehicle Equipment	276			
9	Transportation	CUV	5			
10	Transportation	Sedan	37			

The function bar shows the formula `=aver` and a dropdown menu with the following options:

- AVERAGE (Returns the average)
- AVERAGEA
- AVERAGEIF
- AVERAGEIFS

# AVERAGE FUNCTION

**Step 3:** Close the parentheses and press Enter to see the result in cell C10



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C
1	Department	Type of vehicle	2018
2	Transportation	Pick Up Trucks	93
3	Transportation	Heavy Duty	248
4	Transportation	Transit Bus	379
5	Transportation	SUV	53
6	Transportation	Van	32
7	Transportation	Medium Duty	98
8	Transportation	Off Road Vehicle Equipment	276
9	Transportation	CUV	5
10	Transportation	Sedan	27

The formula bar at the top shows the formula `=AVERAGE(C2:C10)` being entered into cell C11. The spreadsheet grid shows columns A, B, and C, and rows 1 through 10. The data in column C represents the values for the AVERAGE function.



# EXERCISE

Try out the functions MIN and MAX on your  
own

*"Practice makes perfect, and the best practice  
is to understand and love what you do." -*

Wayne Dyer











# BUDGETING IN EXCEL

**Step 6:** Enter the SUM function into cell O4. Remember, select cell O4, type =SUM(, select the range B4:M4, close with a ")" and press Enter.

**Step 7:** Drag cell O4 down to cell O6.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Budget														
2		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year	
3	<b>Income</b>														
4	Salary	2000	2000	2000	2000	2000	2000	2500	2500						17000
5	Dividends	100	100	100	100	100	100	100	100						
6	Total	2100	2100	2100	2100	2100	2100	2600	2600	0	0	0	0		
7															
8	<b>Expenses</b>														
9	Mortgage or rent	1200	1200	1200	1200	1200	1200	1200	1200						
10	Car	200	200	200	200	200	400	400	400						
11	Phone	50	50	50	50	50	50	50	50						
12	Health Insurance	100	100	100	100	100	100	100	100						



# **INVOICING**

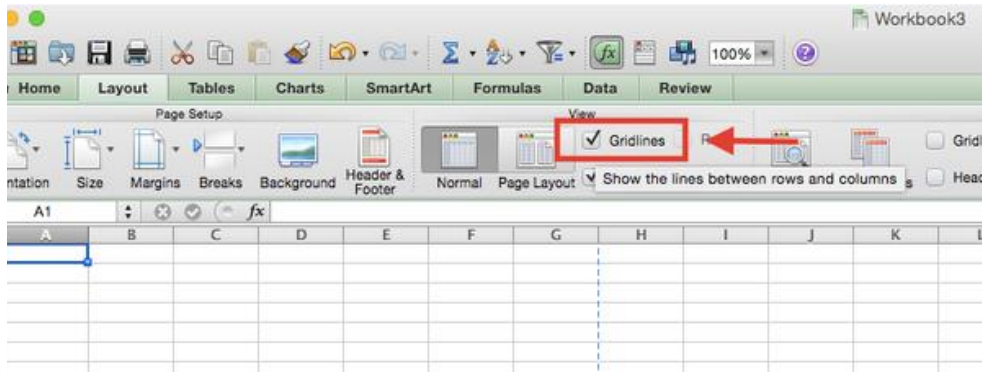
The top of the slide features a decorative border with yellow abstract shapes and circular patterns containing black concentric lines. The main title is centered in a large, bold, black font.

# **INTRODUCTION TO INVOICING IN EXCEL**

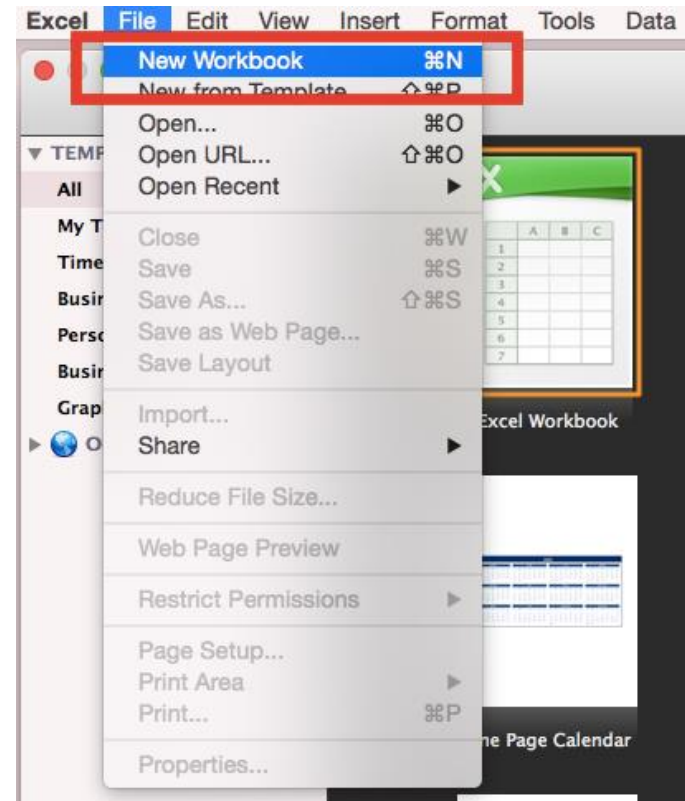
Efficiently create professional invoices with item details, totals, and automated numbering for streamlined business transactions and record-keeping

# INTRODUCTION TO INVOICING IN EXCEL

**Step 2:** Remove Gridlines



**Step 1:** Open a New Blank Workbook





# INTRODUCTION TO INVOICING IN EXCEL

## Step 4: Add Invoice Payment Due Date & Invoice Number



[Your Company Name]

## Invoice

Date: December 1, 2020  
Due date: December 20, 2020  
Customer ID: [ABC12345]



# INTRODUCTION TO INVOICING IN EXCEL

## Step 5: Enter the Client's Contact Information



[Your Company Name]

## Invoice

Date: December 1, 2020

Due date: December 20, 2020

Customer ID: [ABC12345]

To: [Name]  
[Client Name]  
[Street Address]  
[City, ST ZIP Code]  
[Phone]



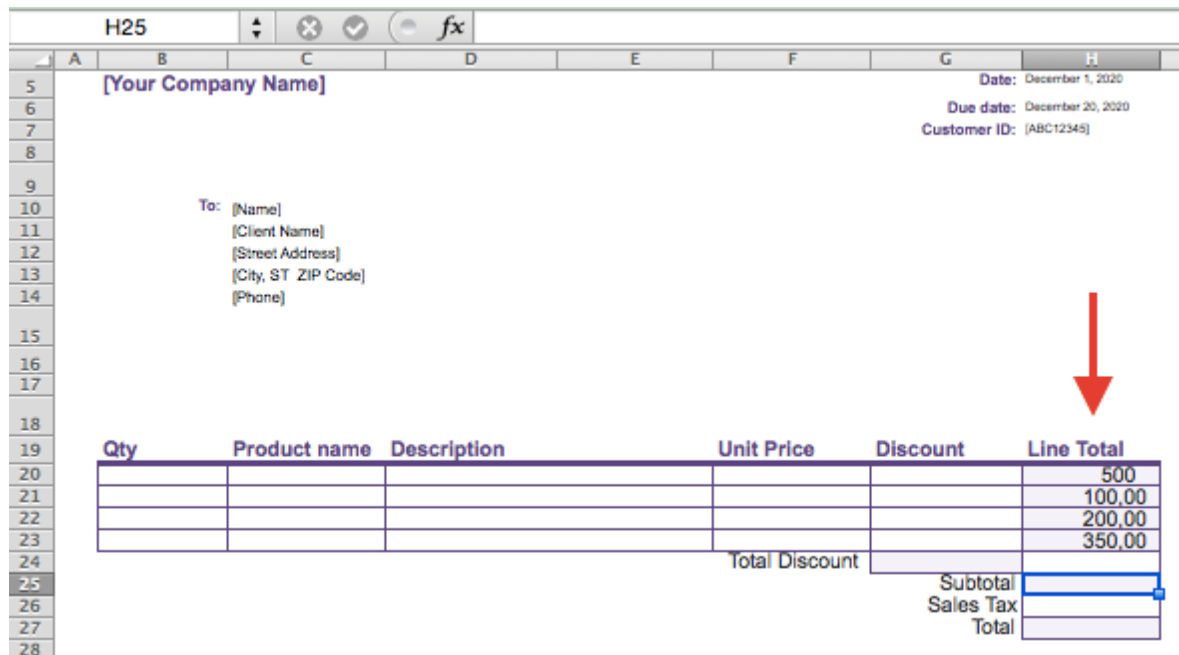
# INTRODUCTION TO INVOICING IN EXCEL

## Step 6: Create an Itemized List of Services and Products

The screenshot displays the Microsoft Excel interface. The 'Tables' ribbon is active, showing options for 'Table Options' (Header Row, Total Row, Banded Rows, Banded Columns, First Column, Last Column) and 'Table Styles'. A red box highlights the 'New' button in the 'Table Options' group, with a red arrow pointing to it. Below the ribbon, the worksheet grid shows a sample invoice layout. The invoice includes a logo and name in the top left, the word 'Invoice' in large purple text in the top right, and a date of December 1, 2020. The due date is December 20, 2020, and the customer ID is ABC12345. The bottom section of the invoice is labeled 'To:' and contains placeholder text for client information: [Name], [Client Name], [Street Address], [City, ST ZIP Code], and [Phone].

# INTRODUCTION TO INVOICING IN EXCEL

**Step 7:** Use the SUM Function to Calculate the Total



The screenshot shows an Excel spreadsheet with the following content:

Qty	Product name	Description	Unit Price	Discount	Line Total
					500
					100,00
					200,00
					350,00
				Total Discount	
					Subtotal
					Sales Tax
					Total

The spreadsheet also includes a header section with the following text:

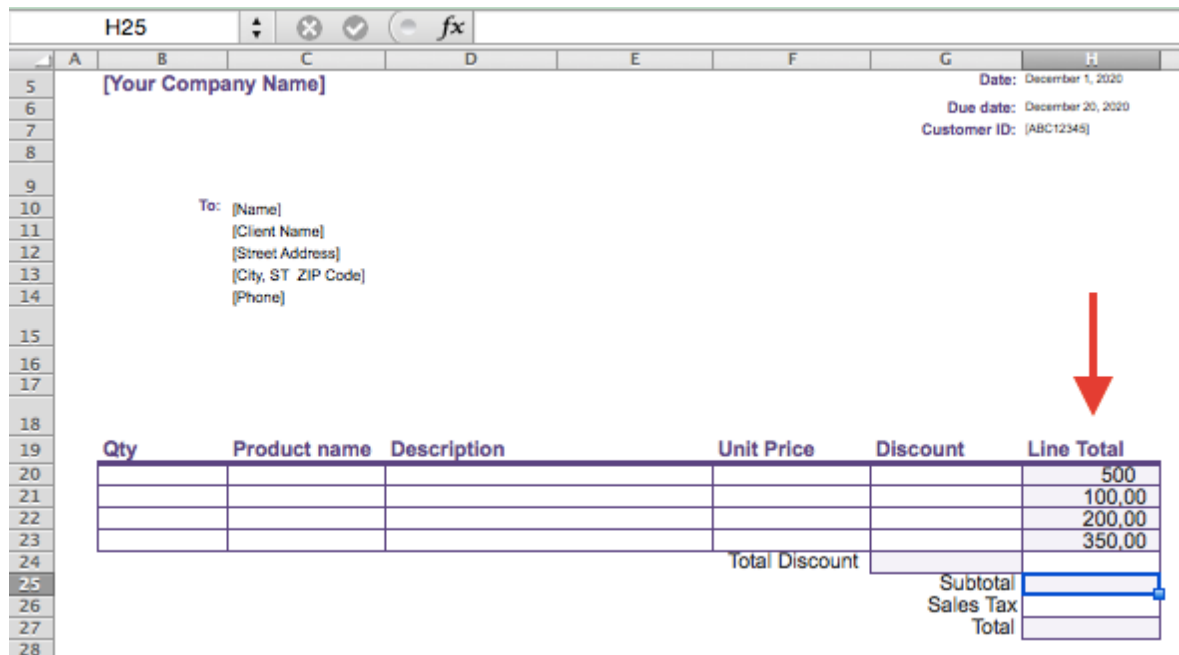
[Your Company Name] Date: December 1, 2020  
Due date: December 20, 2020  
Customer ID: (ABC12345)

To: [Name]  
[Client Name]  
[Street Address]  
[City, ST ZIP Code]  
[Phone]

A red arrow points to the 'Total' cell in the summary table.

# INTRODUCTION TO INVOICING IN EXCEL

## Step 8: Enter the Client's Contact Information



H25

[Your Company Name] Date: December 1, 2020

Due date: December 20, 2020

Customer ID: [ABC12345]

To: [Name]  
[Client Name]  
[Street Address]  
[City, ST ZIP Code]  
[Phone]

Qty	Product name	Description	Unit Price	Discount	Line Total
					500
					100,00
					200,00
					350,00
			Total Discount		
				Subtotal	
				Sales Tax	
				Total	



# INTRODUCTION TO INVOICING IN EXCEL

**Step 8:** Include payment terms and other additional notes

Payment terms: Due within 20 days via credit card.

Thank you for your business!



# INTRODUCTION TO INVOICING IN EXCEL

## **Step 9:** Save and Send Your Finished Invoice

Payment terms: Due within 20 days via credit card.

Thank you for your business!