Introduction to Microsoft Excel: Managing Income and Expenses
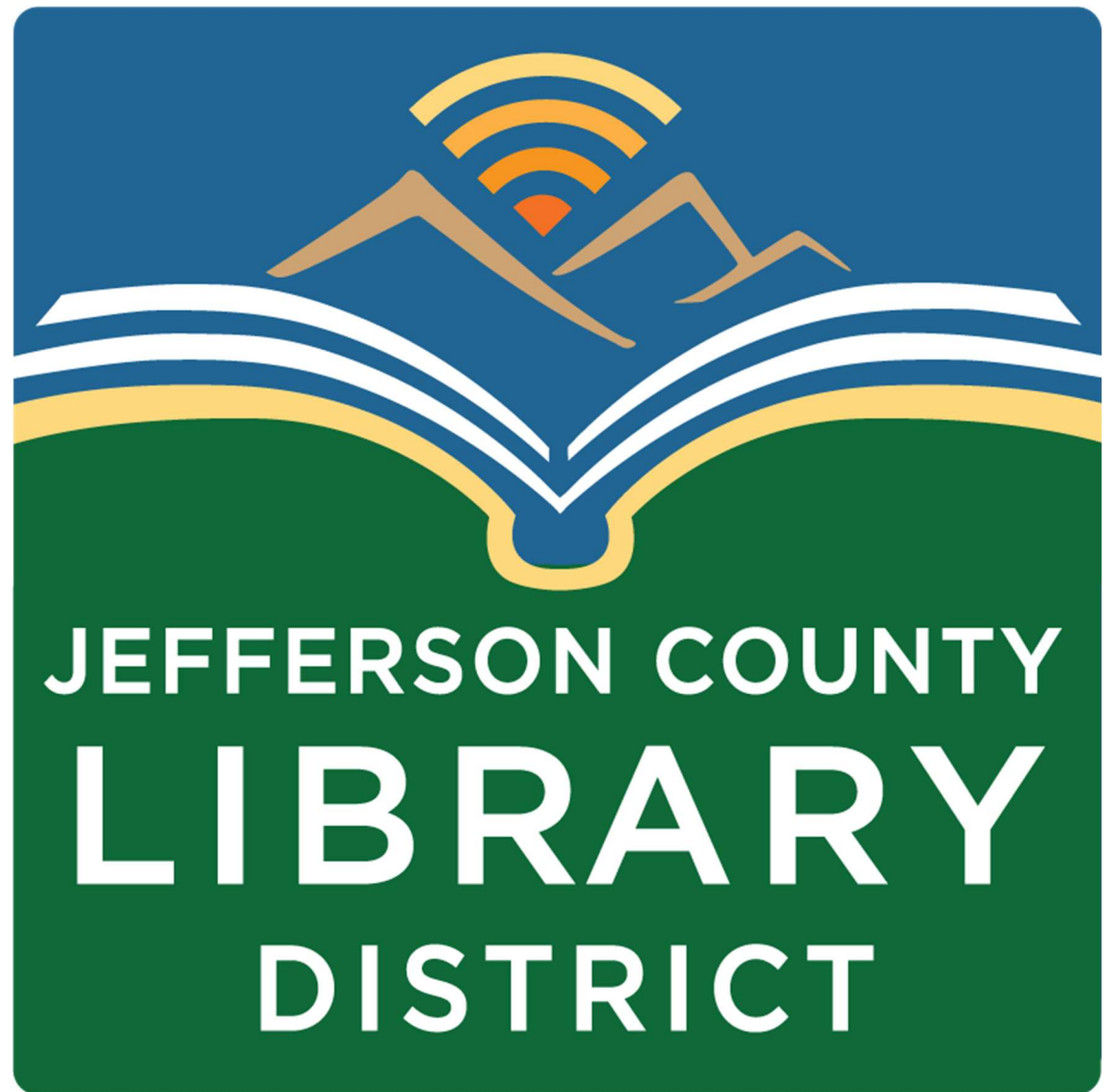
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Digital Equity Navigator

JEFFERSON COUNTY LIBRARY DISTRICT

Contents

Learning Objectives

- Basic formatting – fonts, font size, bold, italicize, underline, alignment
- Autosum
- New sheets
- Autofill

Font – the style of the text. For example, Times New Roman is a type of font.

Font size – the size of the text.

Alignment – when text is aligned to the left of the cell, the center, or the right. In Excel, text can also be aligned to the top of the cell, the middle, or the bottom.
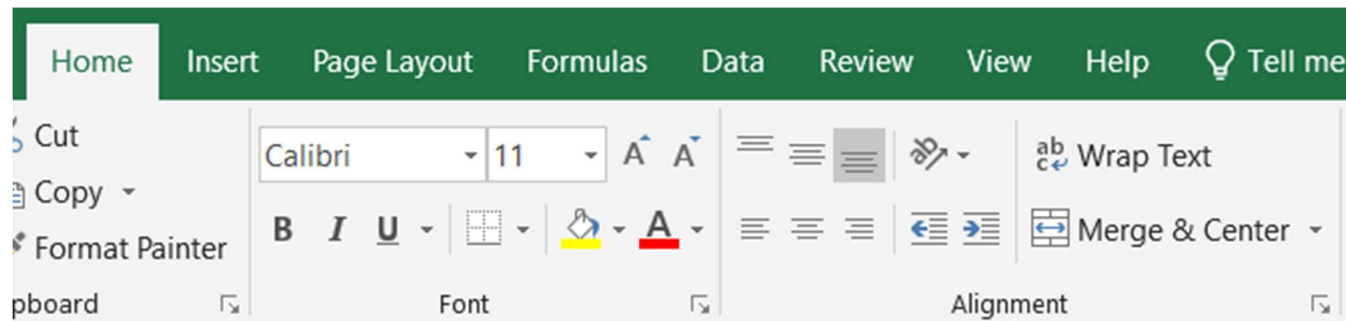
Autosum - calculating the total of a column or row.

Autofill – to copy data or a formula from one cell to multiple cells.

Basic formatting

Basic formatting is under **Home – Font** (tab -section).

Common formatting tools including font, font size, bold, italicize, underline, and alignment.
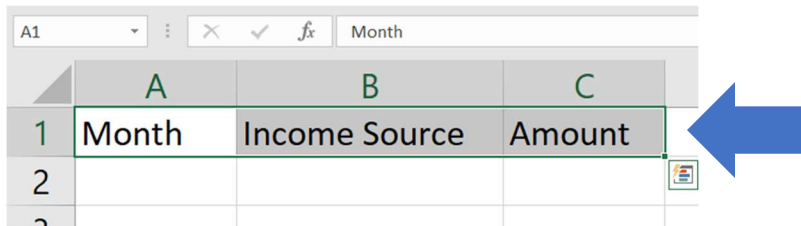

Alignment – top, middle, bottom, left, center, right

Font– type, size, bold, italicize, underline

Fonts

To change the font type, **select** the cells.
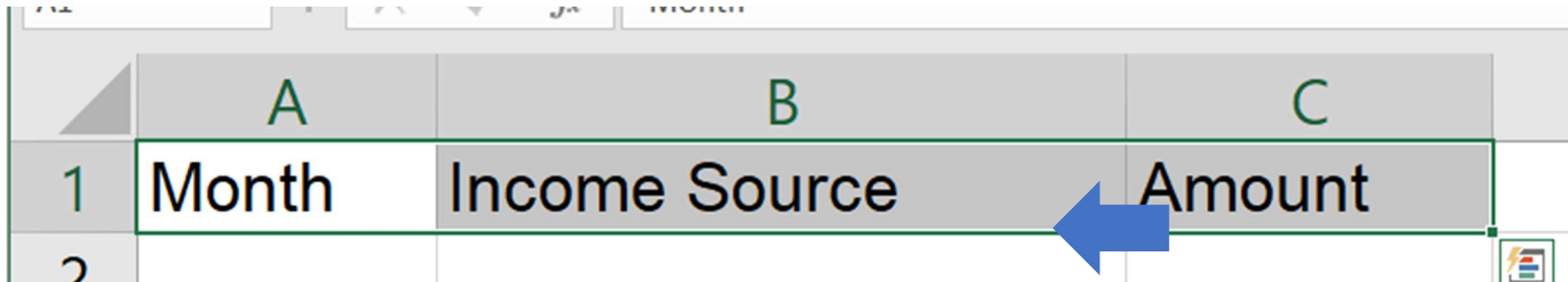

Under **Home – Font**, select the desired font type:
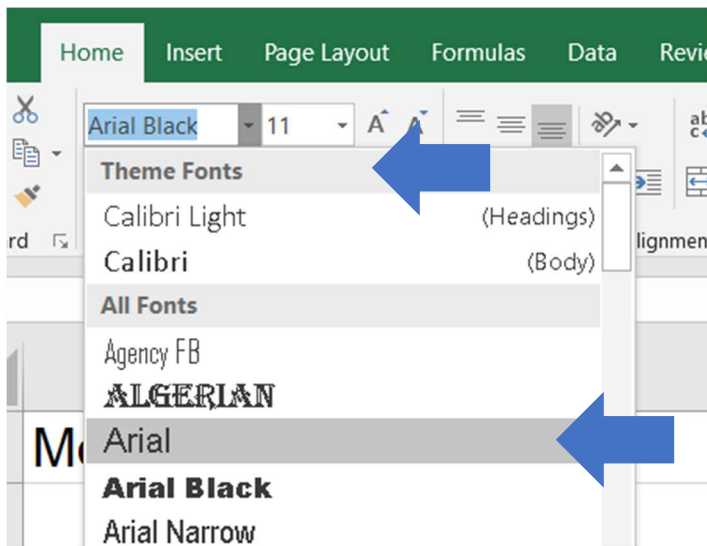
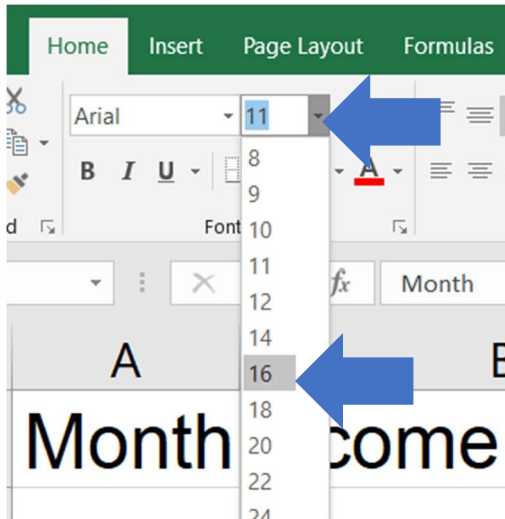Your text should now appear with the font you choose.

	A	B	C
1	Month	Income Source	Amount
2			

Font size

To increase the size of the text, first select the cells.

Under **Home – Tab,** choose the desired size of the text:

Your text should now appear at the size you have chosen.
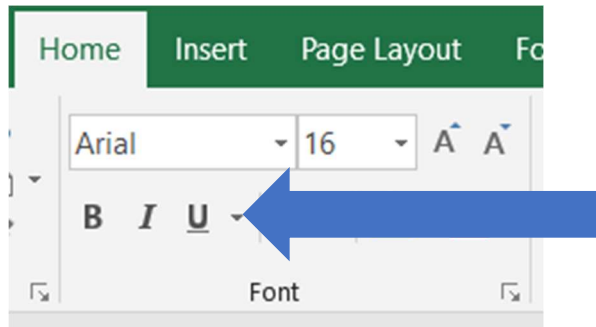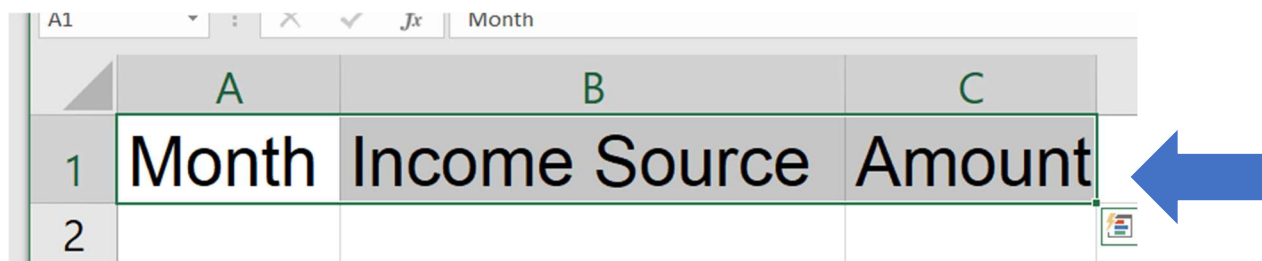
	A	B	C
1	Month	Income Source	Amount
2			

The cell reference box shows B4, with the formula bar controls (X, ✓, fx) visible above the spreadsheet.

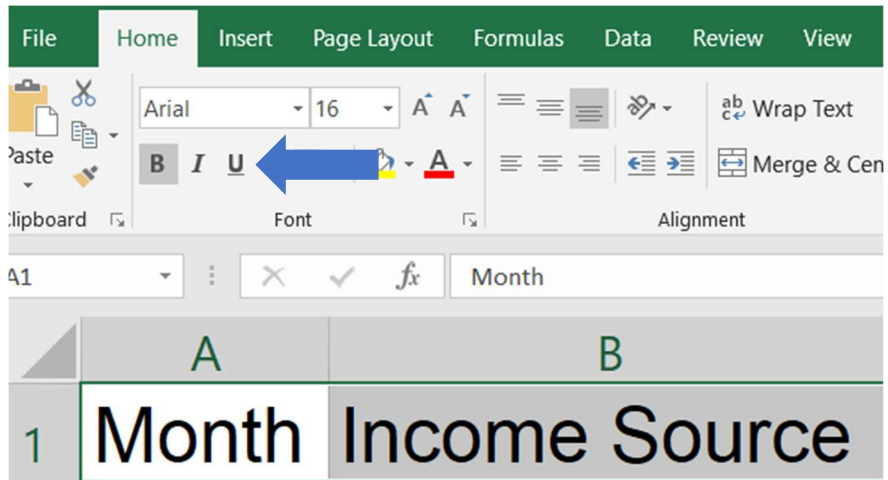## Bold, Italicize, and Underline

Bold, italicize, and underline are also found under the **Home** tab, in the **Font** section.

Like font and font size, to change your text to one of these, first **select the cells.**

Next, click either **B** (bold), **I** (italicize), or **U** (underline) on the ribbon under **Home – Font**.
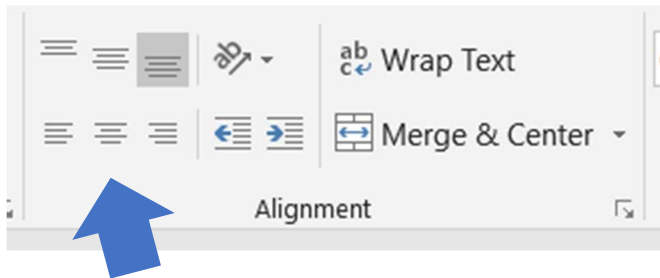
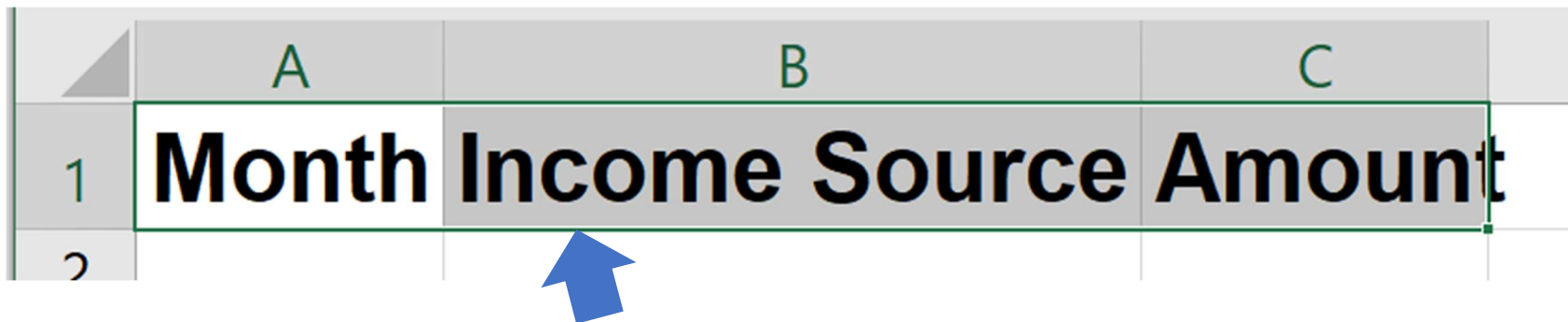Your text should now appear with your selection, in my case, bold.

	A	B	C
1	**Month**	**Income Source**	**Amount**
2			

Alignment

Text can be aligned in their cells. Alignment options are found under **Home – Alignment**.
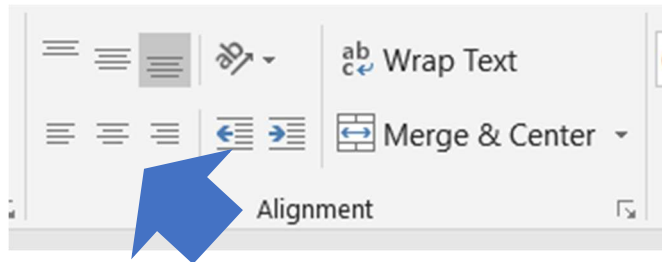

Changing the alignment of text is similar to changing the font or font size. First, select the cells you want to change alignment.
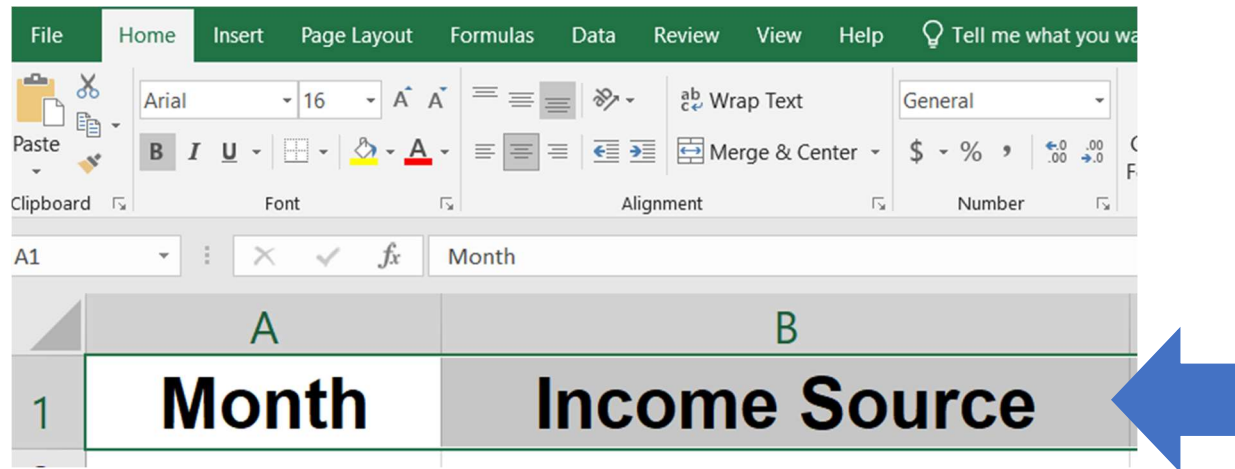
Next, choose your alignment preference.

Note:

The top three alignment options are:
1. Top of the cell
2. Middle of the cell
3. Bottom of the cell

The bottom three alignment options are:
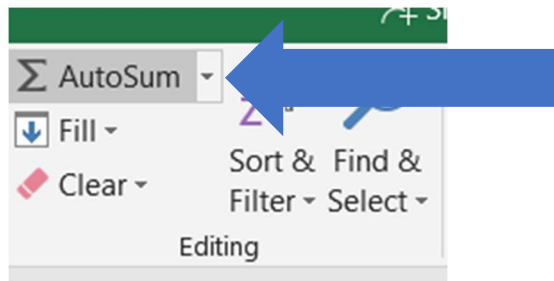1. Left justify
2. Centered
3. Right justified

My text has been centered.

Autosum

Autosum is used to get a total for a range of data.

It is under the **Home** tab, in the **Editing** section.
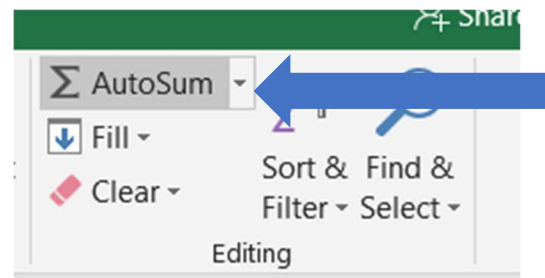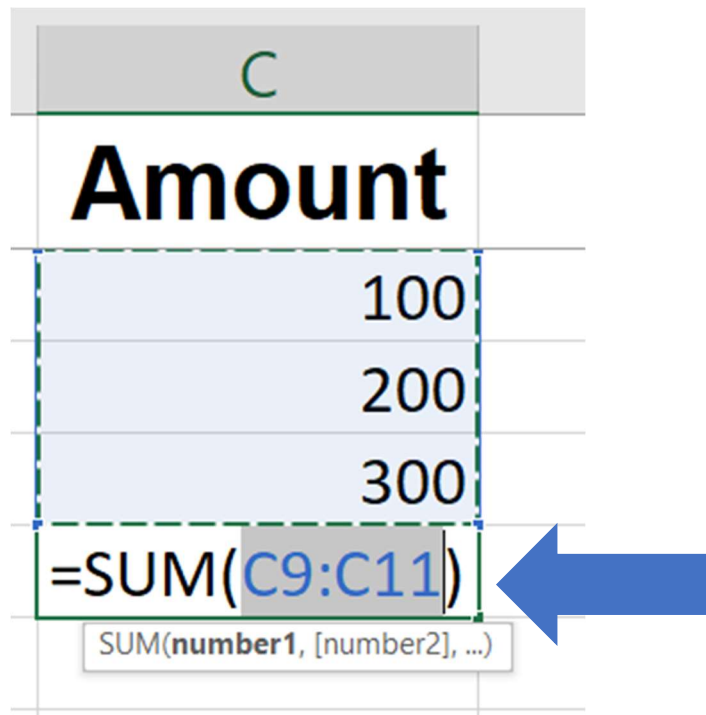
To find the sum of a group of cells:

Click in the last empty cell of the group of cells you want to total. The blank cell is where the total will appear.

Click Autosum

The cells to be totaled will become selected and represented by dotted lines.

In the blank cell you selected, the formula for Autosum will appear.

=SUM(C9:C11)
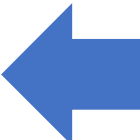
All formulas in Excel will begin with the = sign.

Next is the function, SUM.

Last is the range of cells to be totaled C9 through C11.

To get the total of the selected cells, press **Enter** on your keyboard.

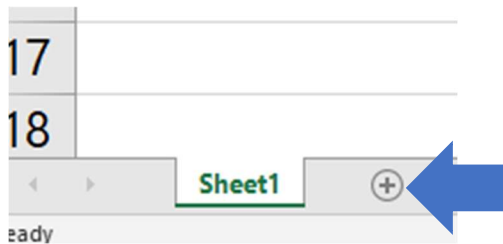| C |
|---|
| **Amount** |
| 100 |
| 200 |
| 300 |
| 600 |

New Sheets

Within a workbook, you can have multiple spreadsheets or sheets.

To create a new sheet within a workbook, click on the plus sign at the bottom left hand corner of the screen.

To rename a sheet:

1. **Right-click** on the sheet name (e.g."Sheet 1").

2. Click **Rename**.
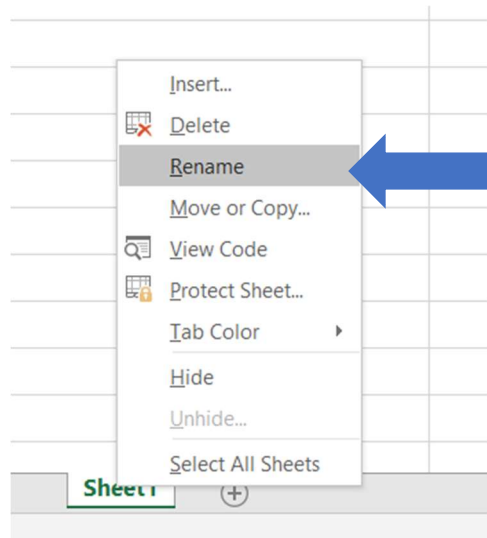
My sheet has been renamed.

Business Overview
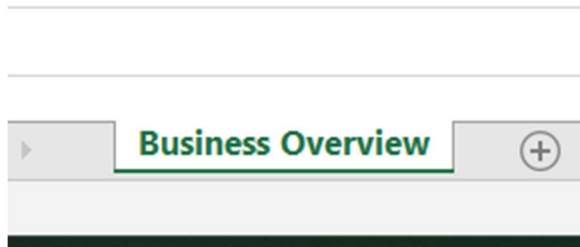
Autofill

Autofill is used to copy data and formulas from one cell to multiple cells. For example, if the expense for 3D filament is the same each month, the amount can be copied from one cell to multiple cells.

	A	B
1	Expenses	Amount - January
2	3D Filament	100
3		

To use Autofill:

1. Select the cell you want to copy.
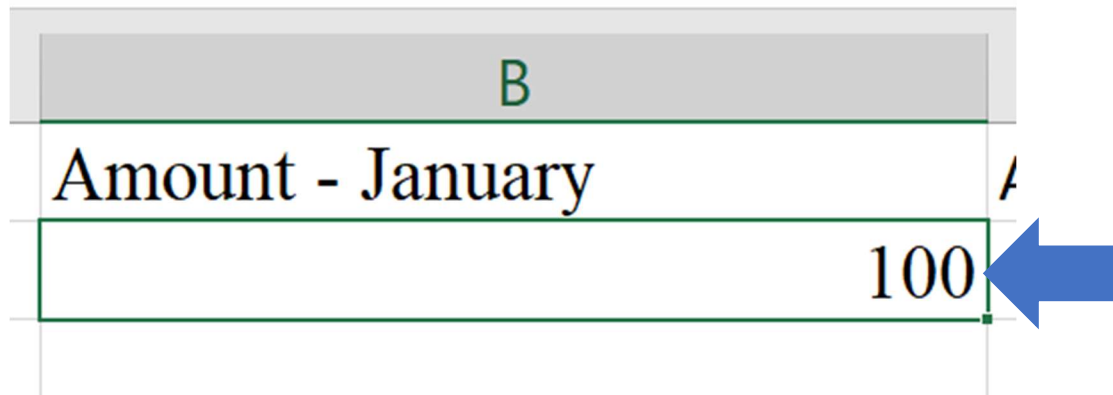
2. Place your cursor over the small square in the lower right-hand corner. The cursor will turn in to a black plus sign.
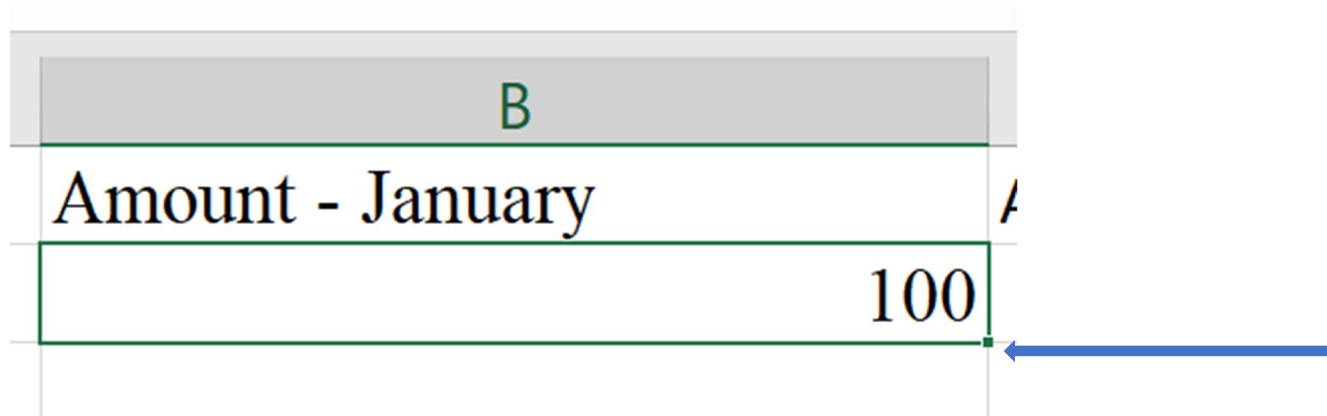
3. Click and hold. Then pull the square over the range of cells you want to copy the data.

   The data is copied to the selected cells.

B	C	D
Amount - January	Amount - February	Amount - March
100	100	100

Tip: You can also fill data by using the ribbon under **Home – Editing – Fill.**

Activity

In the following activity, we are going to create two spreadsheets, one for income revenue for our business, and one for expenses. We will put into practice the skills we have learned previously.
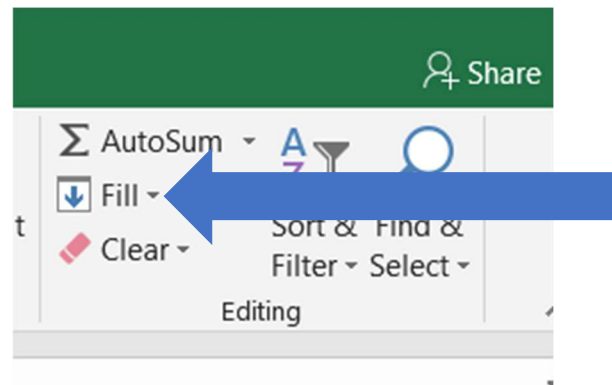
Here is the data you will need to input for the income spreadsheet:

Income Source	Amount - January	Amount - February
Custom 3d Print Orders	2200	1800
Design Services	600	800
Batch Production	1000	1250
Digital File Sales	250	300
Workshops / Classes	200	150
Total Income	?	?

Formatting:

1. Change the font for all cells to Verdana.

2. Make the font size for the headings "Income Source" and "Amount" to 16.

3. Change the headings "Income Source" and "Amount" to Bold.

Totals:

1. Find the total income amount using Autosum for January and February.

Expense Category	Amount -January	Amount - February
Filament / Materials	500	
Maintenance	300	
Power (electricity)	250	
Software and licensing	125	
Marketing and Website hosting	75	
Total Expenses	?	

New sheet:

1. Create a new sheet for your expense spreadsheet.

2. Add the data above.

3. Rename your sheets to reflect their data.

Formatting:

1. Change the font for all cells to Verdana.

2. Make the font size for the headings "Expense Category" and "Amount" to 16.

3. Change the headings "Expense Category" and "Amount" to Bold.

Autofill

1. Use Autofill to copy the expenses from January to February.

Totals:
1. Find the total expense amounts using Autosum.

Analyzing and Reporting

Learn how to use formulas, sort data, and insert charts in this class.