Excel Illuminated
QuickBooks Analysis - Part 2

Course Description

In this course, Excel and QuickBooks expert David Ringstrom, CPA, presents additional ways to analyze data from QuickBooks Desktop and QuickBooks Online in this follow-up to part 1. Among other topics, David covers how to flatten multiple-column reports back into a list format for further analysis, how users of Excel 2016 and later can visually present a summary profit and loss report in chart form by way of Waterfall charts, how users of Excel 2013 and later can implement the Bing Maps add-in to transform summary data into interactive maps, and how users of earlier versions of Excel can clean up their QuickBooks reports.

David demonstrates every technique at least twice: first, on a PowerPoint slide with numbered steps, and second, in the subscription-based Microsoft 365 version of Excel. David draws your attention to any differences in the older versions of Excel (2019, 2016, 2013, and earlier) during the presentation as well as in his detailed handouts. David also provides an Excel workbook that includes most of the examples he uses during the presentation.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Intermediate
CPE Credits: 2 (CPA)
Category: Computer Software and Applications
Prerequisite: Experience with Excel spreadsheets
Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Identify how to use Excel's Text to Columns feature.
2. Recognize the ideal data for use with creating pivot table reports.
3. Identify the keystroke that enables you to select two or more non-adjacent items from a Slicer.