

CHATGPT PROMPTS FOR EXCEL

The Complete Practical Guide 2026

TURN QUESTIONS INTO CHECKED RESULTS

Formulas. Clean data. Clear reports.
Concrete examples you can follow from the first row
to the final dashboard.

COPY-READY PROMPTS / WORKED ANSWERS
ONE CONNECTED SALES CASE / 20 PAGES

A practical reference for business owners,
creators and everyday spreadsheet users.

Independent guide • September 2026 edition

Your route through the guide

03	Choose your workflow
04	Build the practice file
05	Write a prompt that works
06	Calculate revenue and profit
07	Summarize with conditions
08	Look up an order safely
09	Clean text without losing data
10	Make date filters reliable
11	Create a live exception list
12	Build a useful PivotTable
13	Design a chart that explains
14	Define KPIs before calculating
15	Run a transparent scenario
16	Debug the cause, not the symptom
17	Build a repeatable monthly process
18	Reusable prompts for everyday work
19	Sources and quick checks
20	Disclaimer and disclosure

Begin with page 4. Keep a separate copy for experiments.

01 / START WITH THE RIGHT ENVIRONMENT

Choose your workflow

Use this guide in two ways: ask ChatGPT to explain or draft formulas that you paste into Excel, or work through an available spreadsheet integration. Say which environment you are using. A conversation without workbook access cannot inspect hidden tabs, change cells or refresh a PivotTable merely because a prompt asks it to.

COPY-READY PROMPT

I am using Microsoft 365 Excel on Windows with English function names and comma separators. You do not have workbook access. Give me formulas and numbered steps to apply manually. Ask for missing column definitions before proposing a solution.

WORKED RESULT

A useful answer separates instructions from completed actions. If you use the ChatGPT for Excel integration, review the proposed or completed changes in the workbook before sharing it. Availability and interface details can change.

VERIFY BEFORE RELYING ON IT

This guide assumes Microsoft 365 for modern functions. XLOOKUP and FILTER examples need a compatible version. For Excel 2016/2019, use the legacy lookup on page 8 and manual filtering on page 11.

GO ONE STEP FURTHER

Locale matters: some installations use semicolons instead of commas and translated function names. Dates shown here are ISO-style display values; store them as real Excel dates. Source: OpenAI spreadsheet guide and Microsoft function documentation, page 19.

02 / ONE SMALL DATASET, MANY REAL TASKS

Build the practice file

Create a worksheet called Sales. Enter the headers and six rows below in A1:H7. Select the range, choose Insert > Table, confirm that it has headers, and name the table Sales in Table Design. Each row is one order line; all prices and costs are fictional USD values. Cost means cost per unit.

Date	OrderID	Region	Product	Units	Price	Status	Cost
2026-09-01	O001	East	Lamp	10	24	Paid	14
2026-09-02	O002	West	Chair	3	40	Paid	25
2026-09-03	O003	East	Desk	1	180	Pending	105
2026-09-04	O004	East	Lamp	8	24	Paid	14
2026-09-05	O005	West	Shelf	2	50	Paid	30
2026-09-06	O006	East	Shelf	2	40	Paid	24

COPY-READY PROMPT

Check this six-row sample for missing fields and inconsistent types. Keep the original values. Tell me which columns should contain dates, text and numbers. Do not calculate tax, shipping, discounts or refunds because none are supplied.

WORKED RESULT

Add three table columns after Cost: Revenue, COGS and Profit. Pages 6-7 explain the calculations. Type Units, Price and Cost as numbers; formatting text as currency does not convert it into a number.

VERIFY BEFORE RELYING ON IT

Expected row count: 6. Expected order IDs: O001 through O006, all unique. Date is a real date; OrderID, Region, Product and Status are text. Keep the raw sample unchanged when trying cleaning exercises.

Write a prompt that works

An effective prompt describes the desired output and the workbook structure. Include your Excel version, sheet or table name, exact headers, any business rule and a small expected result. This makes it possible to detect a wrong assumption before applying the answer to a larger file.

COPY-READY PROMPT

In Excel Microsoft 365, table Sales has Date, OrderID, Region, Product, Units, Price, Status and Cost. Add Revenue = Units times Price, COGS = Units times Cost, and Profit = Revenue minus COGS. Return structured-reference formulas, explain each, and show the expected result for O001. Do not overwrite the source columns.

WORKED RESULT

The answer should identify three new calculated columns and use the actual header names. For O001, the expected revenue is 240, cost of goods sold is 140, and profit is 100. An answer using invented Discount or Tax columns fails the brief.

VERIFY BEFORE RELYING ON IT

If a required field is missing, ask for it. If an assumption is unavoidable, state it explicitly. Ask for a formula plus a test case rather than accepting an unsupported claim that the workbook is correct.

GO ONE STEP FURTHER

Follow-up prompt: Now list three edge cases that could make these formulas misleading, and explain how I should identify them without changing the raw data.

04 / THREE TRANSPARENT CALCULATED COLUMNS

Calculate revenue and profit

Calculated columns keep the logic visible and consistent across rows. Enter each formula in the first data cell of the corresponding new table column. Check that Excel fills the calculation down the table. This example defines profit as revenue less product cost only, not net business income.

COPY-READY PROMPT

Write structured-reference formulas for Revenue, COGS and Profit in table Sales. Explain the difference between a per-unit cost and a total line cost. Keep numeric outputs numeric and apply USD formatting separately.

FORMULA / ENTER IN EXCEL

Revenue: =[@Units]*[@Price]
COGS: =[@Units]*[@Cost]
Profit: =[@Revenue]-[@COGS]

WORKED RESULT

O001: 240 / 140 / 100. O002: 120 / 75 / 45. O003: 180 / 105 / 75. O004: 192 / 112 / 80. O005: 100 / 60 / 40. O006: 80 / 48 / 32. Values are Revenue / COGS / Profit.

VERIFY BEFORE RELYING ON IT

All six rows total 912 revenue, 540 COGS and 372 profit. This includes the Pending order. A Paid-only report must filter by Status; do not silently mix these definitions.

GO ONE STEP FURTHER

An empty Units cell can behave differently from a genuinely confirmed zero. Decide whether missing quantities should be flagged before using totals. A formula that runs successfully is not proof that the inputs are complete.

05 / SUMIFS AND COUNTIFS

Summarize with conditions

A conditional total answers a business question only when the criteria are clear. Here, Paid is an exact status label. The first example totals revenue from Paid orders in East. The second counts Paid rows, not distinct customers and not individual units.

COPY-READY PROMPT

Using table Sales, calculate Paid revenue for East and count all Paid order rows. Then calculate Paid revenue across all regions. Return formulas and expected sample results. Explain which row is excluded and why.

FORMULA / ENTER IN EXCEL

```
=SUMIFS(Sales[Revenue],Sales[Region],"East",
Sales[Status],"Paid")
=COUNTIFS(Sales[Status],"Paid")
=SUMIFS(Sales[Revenue],Sales[Status],"Paid")
```

WORKED RESULT

East Paid revenue = 512. Paid order rows = 5. All-region Paid revenue = 732. 0003 is Pending, so its 180 revenue is excluded. West contributes 220 to the Paid total.

VERIFY BEFORE RELYING ON IT

Reconcile $512 + 220 = 732$ and $732 + 180 = 912$. All SUMIFS criteria ranges must line up with the sum range. Watch for trailing spaces in status labels and numbers stored as text.

GO ONE STEP FURTHER

Variant prompt: Return Paid revenue by region, plus a separate Pending total. Preserve zero-result regions and label whether the result is a row count, a unit count or a currency amount. Source: Microsoft SUMIFS, page 19.

06 / EXACT MATCHES AND MISSING IDS

Look up an order safely

Create a worksheet called Lookup. Enter O004 in B2. The lookup should return the matching order line revenue. This sample uses unique OrderID values. A lookup is inappropriate for adding several rows that share an order ID: use a conditional sum for that question.

COPY-READY PROMPT

On Lookup, B2 contains an OrderID. Return Revenue from table Sales using an exact match. Show "Not found" for an unknown ID. Also give an INDEX/MATCH alternative for Excel 2016 or 2019. Warn me if duplicates would change the interpretation.

FORMULA / ENTER IN EXCEL

=XLOOKUP(B2,Sales[OrderID],Sales[Revenue],
"Not found",0)

Legacy alternative:
=IFNA(INDEX(Sales[Revenue],
MATCH(B2,Sales[OrderID],0)),"Not found")

WORKED RESULT

O004 returns 192. O999 returns Not found. XLOOKUP with exact matching returns a matching value; it does not automatically aggregate repeated order lines. The sample contains no duplicate IDs.

VERIFY BEFORE RELYING ON IT

Test one existing ID, one missing ID and an intentionally duplicated ID in a copy. Decide whether duplicates are valid business records before changing them. XLOOKUP is not available in Excel 2016/2019.

GO ONE STEP FURTHER

Follow-up prompt: Explain why a lookup returning the first matching line could understate a multi-line order total. Give a SUMIFS alternative for that case. Source: Microsoft XLOOKUP, page 19.

07 / NORMALIZE, REVIEW, THEN REPLACE

Clean text without losing data

Use a separate worksheet called Cleaning so the original sample stays intact. Put two leading spaces, East and two trailing spaces in A2. Add a web-style nonbreaking space in another test cell. Extra spaces can prevent labels that look identical from matching.

COPY-READY PROMPT

Clean leading, trailing and repeated ordinary spaces in A2. Also handle nonbreaking spaces with character code 160. Keep the original column and put the cleaned result in B2. Explain what this approach does not fix.

FORMULA / ENTER IN EXCEL

`=TRIM(SUBSTITUTE(A2,CHAR(160)," "))`

Flag repeated OrderID values in Sales:
`=COUNTIF(Sales[OrderID],[@OrderID])>1`

WORKED RESULT

The padded East label becomes East. Repeated order IDs return TRUE in the flag column. Review flagged rows rather than deleting them immediately: multiple lines may legitimately belong to one order.

VERIFY BEFORE RELYING ON IT

TRIM does not remove every Unicode whitespace character. The formula explicitly addresses ordinary spaces and CHAR(160). Do not apply PROPER blindly to product codes, acronyms or customer names.

GO ONE STEP FURTHER

Follow-up prompt: Produce a before/after audit showing changed values and the number of affected rows. Keep identifiers with leading zeros as text. Never merge records solely because their names look similar. Source: Microsoft TRIM, page 19.

08 / REAL DATES, CLEAR BOUNDARIES

Make date filters reliable

Date-looking text can break a monthly report. Enter the practice dates with DATE(year,month,day) if your locale interprets typed dates unpredictably, then apply a yyyy-mm-dd display format. Filtering an entire month should include every time on the last day.

COPY-READY PROMPT

Calculate Paid revenue for September 2026 from table Sales. Use a lower bound of September 1 and an exclusive upper bound of October 1, so timestamps on September 30 remain included. Explain why a displayed date alone does not prove its stored type.

FORMULA / ENTER IN EXCEL

```
=SUMIFS(Sales[Revenue],Sales[Status],"Paid",
Sales[Date], ">="&DATE(2026,9,1),
Sales[Date], "<"&DATE(2026,10,1))
```

Type check on a Sales row:
=ISNUMBER([@Date])

WORKED RESULT

The practice result is 732 because all five Paid rows fall inside September. For actual imported timestamps, the upper bound excludes October 1 without accidentally excluding most of September 30.

VERIFY BEFORE RELYING ON IT

ISNUMBER confirms a numeric value, not that the date is sensible. Also review minimum and maximum dates. Do not guess whether 03/04/2026 means March 4 or April 3; establish the source locale first.

GO ONE STEP FURTHER

Variant prompt: Replace the hard-coded month with a real month-start date in Summary!B1 and use EDATE(Summary!B1,1) as the next-month boundary. Keep the chosen month visible above the report.

09 / FILTER WITHOUT DESTROYING THE SOURCE

Create a live exception list

An exception view makes a small set of records easy to inspect without sorting or deleting the original rows. On a new worksheet called Exceptions, reserve a blank area outside any Excel Table. The returned array needs enough room to expand.

COPY-READY PROMPT

In Microsoft 365, return all Pending rows from Sales into Exceptions!A2. Use a friendly message when none exist. Explain where to place the formula and how to investigate a #SPILL! error. Do not change Sales.

FORMULA / ENTER IN EXCEL

```
=FILTER(Sales,Sales[Status]="Pending",  
"No pending orders")
```

WORKED RESULT

The result is O003, dated 2026-09-03, East, Desk, 1 unit, price 180, Pending, cost 105. If you have added Revenue, COGS and Profit, the output includes those columns too.

VERIFY BEFORE RELYING ON IT

Keep the spill range clear and unmerged. Put the formula outside an Excel Table. FILTER requires a compatible dynamic-array version; for older Excel, use the Status dropdown filter and copy the visible rows to a review sheet.

GO ONE STEP FURTHER

Follow-up prompt: Add an exception for missing Status values, but keep it separate from Pending. A missing value is a data-quality problem, while Pending is a valid business status. Sources: Microsoft FILTER and spill guidance, page 19.

Build a useful PivotTable

Create a PivotTable from table Sales on a new worksheet called Summary. Use Region for rows, Status for columns and Revenue for values. Make sure the value calculation is Sum, not Count. Add currency formatting to the value field.

COPY-READY PROMPT

Give me manual steps for a PivotTable with Region rows, Status columns and Sum of Revenue values. Show the expected six-row sample result. Explain how to refresh after new rows are added and how to detect a Count-versus-Sum mistake.

WORKED RESULT

East: Paid 512, Pending 180, total 692. West: Paid 220, Pending 0, total 220. Grand total: Paid 732, Pending 180, all statuses 912. A blank empty-category cell may represent no records; decide how to display it.

VERIFY BEFORE RELYING ON IT

Compare the PivotTable grand total with SUM(Sales[Revenue]). After adding data, confirm the table expanded and refresh the PivotTable. If a field defaults to Count, inspect the source for text or missing numeric values.

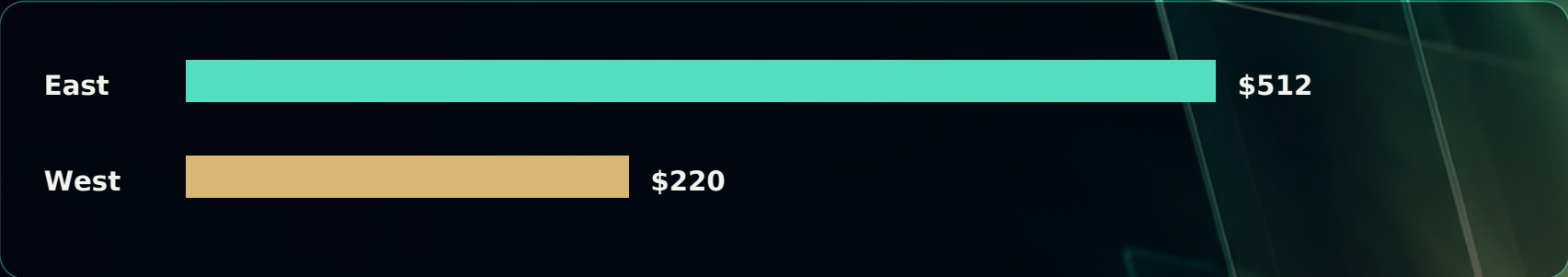
GO ONE STEP FURTHER

Follow-up prompt: Add Units as a second value field but do not format it as currency. Explain why summing unit prices would be an unhelpful performance KPI. Source: Microsoft PivotTable guidance, page 19.

11 / TWO REGIONS, ONE CLEAR QUESTION

Design a chart that explains

Use a small summary with East Paid revenue of 512 and West Paid revenue of 220. A horizontal bar chart answers the question directly: how does recorded Paid revenue compare across these two regions? Use a zero baseline and currency labels.



COPY-READY PROMPT

Create instructions for a two-category horizontal bar chart titled "Paid revenue by region - September 2026". Use East = 512 and West = 220 USD. Start the value axis at zero, show data labels and avoid 3D effects. Add one factual sentence and one limitation.

WORKED RESULT

Factual caption: East contributes 512 of the 732 recorded Paid revenue, approximately 69.9%. Limitation: this six-row fictional sample cannot establish market demand, future growth or the reason for the regional difference.

VERIFY BEFORE RELYING ON IT

Do not chart the 912 all-status total under a Paid-revenue title. Chart source cells should be numeric and traceable to the summary. Recheck labels and source ranges after a refresh.

Define KPIs before calculating

For the five Paid rows, revenue is 732 and product cost is 435. Their difference is 297. A margin uses revenue as its denominator; markup uses cost. Neither metric includes business costs that are absent from the sample.

COPY-READY PROMPT

Calculate Paid revenue, Paid COGS, Paid product profit and product margin from Sales. Put these in B2:B5 on a KPI sheet. Explain the denominator, handle zero revenue explicitly and do not label product profit as net income.

FORMULA / ENTER IN EXCEL

B2: =SUMIFS(Sales[Revenue],Sales[Status],"Paid")
B3: =SUMIFS(Sales[COGS],Sales[Status],"Paid")
B4: =B2-B3
B5: =IF(B2=0,"N/A",B4/B2)

WORKED RESULT

B2 = 732; B3 = 435; B4 = 297; B5 = 40.57% after percentage formatting. Markup would be 297/435 = 68.28%, a different measure. Avoid averaging row-level percentages to obtain overall margin.

VERIFY BEFORE RELYING ON IT

Reconcile 732 - 435 = 297. Format B5 as a percentage; do not multiply the formula by 100 and also apply percentage formatting. When revenue is zero, N/A signals that the ratio is undefined.

GO ONE STEP FURTHER

Follow-up prompt: Write a data dictionary defining each KPI, its formula, included statuses, currency and excluded costs. Have the report owner confirm those definitions before monthly use.

13 / CHANGE ASSUMPTIONS, NOT HISTORY

Run a transparent scenario

Create a Scenario worksheet. Treat the five Paid rows as a fixed-volume baseline. Explore a price increase while holding units and per-unit cost unchanged. This is an illustration of sensitivity, not a forecast of customer behavior.

COPY-READY PROMPT

Using baseline revenue 732 and COGS 435, calculate revenue and product profit at price changes of -5%, 0%, 5% and 10%. Keep unit volumes and costs constant. Separate the assumption from the formula and state why the result is not a demand forecast.

FORMULA / ENTER IN EXCEL

B2: 732 | B3: 435 | B4: 5%
B6: =B2*(1+B4)
B7: =B6-B3
B8: =IF(B6=0,"N/A",B7/B6)

WORKED RESULT

At +5%: revenue 768.60, profit 333.60, margin 43.40%. At -5%: profit 260.40. At 0%: 297.00. At +10%: 370.20. No tax, refunds, discounts or volume response are modeled.

VERIFY BEFORE RELYING ON IT

Enter 5% or 0.05, not 5. Preserve the original Sales prices. A scenario must not overwrite recorded transactions or be described as an expected real-world outcome.

GO ONE STEP FURTHER

Follow-up prompt: Add an explicit unit-volume multiplier as a second assumption. Explain why changing price may affect volume, but do not invent an elasticity or customer-response estimate.

14 / A STRUCTURED ERROR INVESTIGATION

Debug the cause, not the symptom

When a formula fails, share its exact text, the error shown, your Excel version and a small sanitized example. Avoid replacing every error with zero. That may produce a neat report while hiding missing data or an incorrect reference.

COPY-READY PROMPT

My formula `=SUMIFS(Sales[Revenue],Sales[Region],"East")` returns 692, but I expected 512. Explain the discrepancy using the sample. Identify the missing business condition and provide a corrected formula. Do not use `IFERROR` to hide the difference.

FORMULA / ENTER IN EXCEL

```
=SUMIFS(Sales[Revenue],Sales[Region],"East",
Sales[Status],"Paid")
```

WORKED RESULT

692 is correct for all East rows; it includes the Pending order worth 180. The intended Paid-only question returns 512. This is a specification error rather than a broken Excel calculation.

VERIFY BEFORE RELYING ON IT

`#NAME?` may mean an unsupported function or misspelled name. `#N/A` may mean no lookup match. `#VALUE!` needs a type or argument review. `#SPILL!` requires room for an array. Investigate before adding error handling.

GO ONE STEP FURTHER

Follow-up prompt: List the smallest tests that distinguish a wrong range, wrong criteria and wrong data type. Explain what a successful result would look like for each test, then change only the confirmed cause.

Build a repeatable monthly process

A dependable workflow preserves the imported records, calculates metrics separately and records what changed. Use Raw for untouched imports, Sales for a reviewed working table, Summary for aggregates and Readme for definitions, source details and refresh instructions.

COPY-READY PROMPT

Design a monthly workflow for a sales CSV. Preserve Raw, validate the headers, review duplicate IDs, normalize approved status labels, calculate Revenue and COGS, refresh Summary, and reconcile totals. Return a manual checklist first. Identify ambiguous rules before suggesting automation.

WORKED RESULT

For the practice file, the reconciliation should report 6 rows, 5 Paid rows, 732 Paid revenue, 180 Pending revenue and 912 total revenue. A second import must not simply append the same six records and double the report.

VERIFY BEFORE RELYING ON IT

Define whether each import is a complete replacement or a new incremental period. Choose a stable deduplication key; OrderID alone may not be unique in real line-item exports. Keep a log of rejected and changed rows.

GO ONE STEP FURTHER

Automation prompt: Propose a Power Query approach for a consistent monthly folder import. Name the expected schema and refresh steps. Explain how to review the transformations and recover the original data before providing any code.

Reusable prompts for everyday work

Replace bracketed text with actual workbook details. Supply a few sanitized rows and an expected output whenever possible. These prompts are starting points: the quality of the result depends on clear definitions and the information available to the assistant.

COPY-READY PROMPT

1. Explain this formula: [formula]. Identify every reference and show one worked example.
2. Compare [old sheet] and [new sheet] by [unique key]. Separate added, removed and changed records; do not rely on row position.
3. Classify [feedback column] using [approved categories]. Include an Uncertain category and preserve the original text.
4. Create a validation rule for [column] with allowed values [list]. Give manual setup steps and an invalid-input test.
5. Summarize [verified KPI table] in 100 words. Cite the source cells, separate facts from explanations and do not invent causes.

WORKED RESULT

A useful output states assumptions and exceptions, names affected ranges and gives an independent check. For classification, review uncertain and high-impact cases rather than assuming the labels are correct.

VERIFY BEFORE RELYING ON IT

Never upload confidential customer or employee data without appropriate authorization. Use synthetic examples when the real identities are irrelevant. Ask for a change summary before replacing an existing workbook.

GO ONE STEP FURTHER

Final review prompt: Audit the proposed solution for unsupported functions, ambiguous dates, hidden assumptions and formulas that suppress errors. Return issues first, then a revised answer with a small test case.

REFERENCE / KEEP THE GUIDE USEFUL

Sources and quick checks

OpenAI: ChatGPT for Excel and Google Sheets

Microsoft: XLOOKUP and version compatibility

Microsoft: SUMIFS syntax and criteria

Microsoft: TRIM and nonbreaking spaces

Microsoft: FILTER function

Microsoft: dynamic arrays and spill behavior

Microsoft: creating and refreshing PivotTables

BEFORE YOU USE AN ANSWER

Confirm the correct workbook, exact headers, intended units, included statuses, compatible Excel version and locale. Keep assumptions visible. Test a normal case, a missing value and a boundary case before applying a formula to a larger file.

VALIDATION NOTE

The sample arithmetic and expected aggregates were checked independently with Python. Formula syntax was reviewed against the cited documentation; the workbook was not executed in Microsoft Excel. Recalculate and test in your own Excel version. Sources checked September 4, 2026.

Disclaimer and disclosure

DISCLAIMER

This guide is provided for educational and informational purposes. Examples use fictional data and simplified assumptions. AI-generated answers can be incomplete or incorrect. Check formulas, references, calculations and proposed changes before relying on them. Nothing here constitutes financial, accounting, tax or legal advice.

YOUR DATA AND YOUR WORKBOOK

Use authorized tools and follow your organization's data-handling rules. Remove unnecessary personal or confidential information before sharing examples. Preserve a recoverable copy of important workbooks and review generated code before running it.

INDEPENDENT GUIDE

Digital World Pulse is not affiliated with or endorsed by OpenAI or Microsoft. ChatGPT and Excel are trademarks of their respective owners. Product features and availability can change. Decorative visuals are AI-generated; the tables and chart use the stated fictional data.

DISCLOSURE

Disclosure: This post may contain affiliate links. Purchases or sign-ups made through these links may generate a commission for this website at no additional cost to you. Read the full [Affiliate Disclosure](#) for details.