



Microsoft Copilot in Excel

Cheat Sheet

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Introduction

Microsoft Copilot is an AI assistant built into Excel that lets you analyze data, write formulas, clean spreadsheets, and build reports using plain English—no advanced Excel knowledge required.

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Getting Started

1. Check your license Requires a Microsoft 365 Copilot license — a paid add-on not included in standard Personal, Business, or Enterprise plans.

2. Save your file to OneDrive or SharePoint Turn on AutoSave in the Excel desktop app.

3. Format your data as a Table Select your data range, then press **Ctrl + T** (Windows) or **Cmd + T** (Mac).

4. Open the Copilot pane Click the **Copilot icon** on the **Home tab** in the ribbon. Type your prompt in the chat box or choose a suggested starter.

5. Use Formula Autocomplete Type **=** in any cell and Copilot suggests a formula based on your headers. Press Tab to accept.

Three Modes at a Glance

Chat Pane (Default)

Suggests actions, explains formulas, and surfaces insights — without editing your sheet directly. **Best for:** Formula help, trend spotting, quick questions about your data.

Edit with Copilot

Executes multi-step instructions across your workbook conversationally. **Best for:** Building templates, restructuring data, multi-step tasks.

Agent Mode

Plans, executes, and validates actions in the grid, step by step. **Best for:** Complex workflows, model building, full report generation.

Key Terms

- Copilot Pane — The sidebar chat interface, opened from the Home tab ribbon.
- Agent Mode — Advanced mode where Copilot takes autonomous, multi-step actions in your workbook.
- Prompt — The plain-English instruction you type into the Copilot chat box.
- Table — A formatted Excel data range (**Ctrl + T**) that Copilot reads most reliably.
- AutoSave — Must be enabled for Copilot to function in the Excel desktop app.
- Formula Autocomplete — Copilot's proactive formula suggestion when you type **=** in a cell.
- =COPILOT()** — A native Excel function that embeds AI analysis directly into a cell.

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Core Actions & Prompts

Writing Better Prompts

1. Be specific about location — reference columns, ranges, and time periods directly.

- Bad: **Summarize the data**
- Good: **Summarize the sales figures in columns B through E for Q4**

2. State the goal — tell Copilot what question the output should help answer.

- Bad: **Create a chart**
- Good: **Create a bar chart comparing monthly expenses so I can spot which months went over budget**

3. Define assumptions explicitly — tell Copilot how to handle edge cases in your data.

- Bad: **Calculate the average**
- Good: **Calculate the average, ignoring rows where column B is blank**

4. Iterate, don't restart — Copilot retains session context, use it.

- Bad: **Create a PivotTable showing total sales by region for 2024 broken down by category**
- Good: **Now break that down by category (after the previous response)**

5. Re-ask with more detail if it misses — don't just say that's wrong.

- Bad: **That's not what I meant**
- Good: **Show the same data as a percentage of total, not absolute values**

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Workflows

1) Formulas — Generate (*Chat Pane*)

Create a formula that calculates the percentage change between column B and column C

Write a formula that shows the running total of sales in column D

Add a column that flags any value in column E greater than 1000 as "Over Budget"

2) Formulas — Explain (*Chat Pane*)

Explain how the formula in cell F12 works

3) Data Cleaning (*Agent Mode*)

Remove duplicate rows from this table

Highlight all cells in column D that are missing a value

Find any entries in column A that look like data entry errors

4) Analysis & Insights (*Chat Pane*)

What are the top 5 products by total revenue in this table?

Which month had the highest average spend, and by how much?

Summarize this spreadsheet in plain English

After a summary, ask: **What would you investigate next?**

5) Edit with Copilot (*Edit with Copilot*)

Build an expense tracking template and add formulas for variance calculations

Restructure this data so each product is in its own row with monthly columns

Add a summary section at the top of this sheet pulling key totals from the table below

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Workflows

6) PivotTables & Charts (*Agent Mode*)

Create a PivotTable showing total sales broken down by region and product category

Build a bar chart comparing Q3 and Q4 revenue by division

Create a line graph of monthly new customer sign-ups for 2024

7) Formatting (*Agent Mode*)

Apply conditional formatting to highlight values greater than 5000 in green

Suggest a color scheme for this table that makes it easy to read

Apply a heatmap to the values in columns B through F

To adjust, follow up — for example: **Reverse the color scale so red shows the highest values**

8) Summarize & Report Out (*Agent Mode*)

Summarize this data in a financial review format and add it as a new sheet

Summarize this spreadsheet as an itinerary

Draft an email summary of this data with a link to open it in Outlook

=COPILOT() Function

⚠ Requires a Copilot-enabled license.

The **=COPILOT()** function embeds AI analysis directly into a cell. When the referenced data changes, the output updates automatically.

Syntax

=COPILOT("your prompt here", A1:D10)

Examples

=COPILOT("Summarize", B2:G2)

=COPILOT("Classify this feedback as Positive, Neutral, or Negative", B12:B50)

=COPILOT("What trends do you see?", B7:G7)

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Limitations & Watch-Outs

- Always review formula outputs** — Check any formula or business logic Copilot generates before using it in reports or decisions.
- Data must be in table format** — Copilot struggles with merged cells, non-standard layouts, and plain cell ranges. Press **Ctrl + T** before you start.
- No cross-sheet analysis** — Copilot works within a single sheet.
- Large files slow Copilot down** — Response times exceed 30 seconds above 2 million cells.
- English-only prompts work most reliably** — Non-English prompts may produce inconsistent results.
- File must be .xlsx format** — Save older .xls files as .xlsx before using Copilot.

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Put Copilot to Work

