



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.

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**

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

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)

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

