Excel Intellect

www.excelintellect.com

AI Prompt Sheet for Spreadsheets

Prompts for Copilot, Gemini and other assistants, each written so you can check the result.

Build a good prompt

- Name the sheet, columns and row range.
- State the exact output you want.
- Set the allowed values or format.
- Ask it to list every change it makes.

Check before you trust it

- Read each range reference.
- Test five rows by hand.
- Try blanks, zeros and missing values.
- Reconcile with a known total.

Finance

Variance review

Column B has budget and column C has actuals for each cost line in column A. Add variance and variance % columns, then flag lines over 10% in either direction. Show every formula you add.

Cash flow forecast

Using the monthly receipts and payments in this sheet, build a 12-month cash forecast with opening balance, net movement and closing balance. Use formulas only, and list your assumptions.

HR

Leave balance tracker

Each employee has annual entitlement in column B and leave dates in a second table. Write formulas that return days taken and days remaining, excluding the weekend pattern I specify.

Headcount summary

Summarize this employee list by department and contract type. Return one formula-driven table with totals. Do not change the source data.

Sales

Pipeline by stage

Group this pipeline by stage and owner, with deal count and total value. Add a chart and tell me which ranges you used.

Top customers

Write a formula that returns the top 10 customers by revenue from columns A and D. Give me both the Excel and Google Sheets versions.

Operations

Reorder alert

Stock is in column C and reorder level in column D. Add a status column that shows Reorder when stock is at or below the level, and count how many items need reordering.

Data cleaning

Standardize a messy export

Clean this export on a copy of the sheet: trim spaces, fix date formats, standardize country names and remove exact duplicates. List every change and how many rows it affected.

Explain before changing

Explain what this formula does, step by step, in plain language. Point out edge cases where it could return a wrong result. Do not change it yet.

In-cell AI functions

Platform	Formula
Excel	`=COPILOT("Classify as Positive, Neutral or Negative. Answer with one word.",A2)`
Google Sheets	`=AI("Classify as Positive, Neutral or Negative. Answer with one word.",A2)`

Both need a qualifying plan and can return different results between runs. Keep financial totals and compliance work in standard formulas, and follow your company data policy.

Every function, free templates and practical AI guides for Excel and Google Sheets. **www.excelintellect.com**