IREM® Global Summit

Excelling with Excel: Spreadsheet Techniques for Real Estate Managers

Presented by

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#IREMforward

Excel Versions

I'll be teaching from the Office 365 version of Excel, and noting any differences or limitations in the legacy versions of Excel.

The Future of Excel

Office 365

Subscription-based version of Microsoft Office, which includes Excel. Use the software on multiple devices, new calculation engine, services and more features are rolling out that will dramatically set this version apart from past Excel versions.

www.office365.com

Legacy Versions

Perpetual Licenses

Pay once for the software to use on a single computer. No new features added until you buy a new license.

Includes

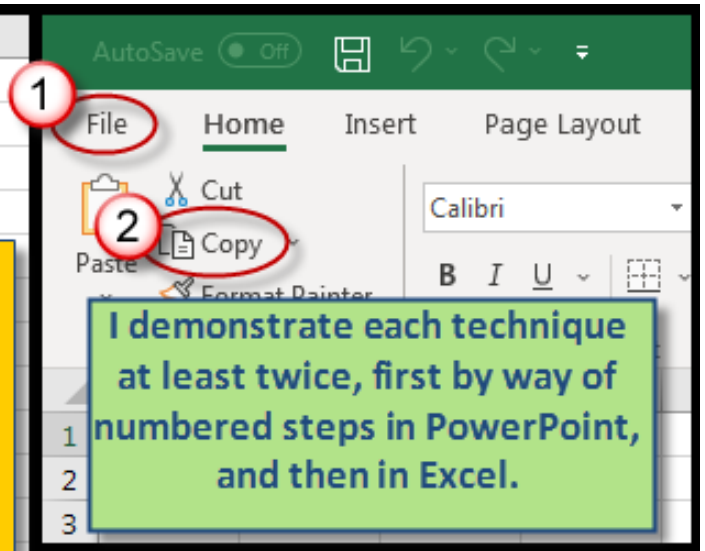
Excel 2019

Excel 2016

Excel 2013

Excel 2010

Excel 2007 and earlier

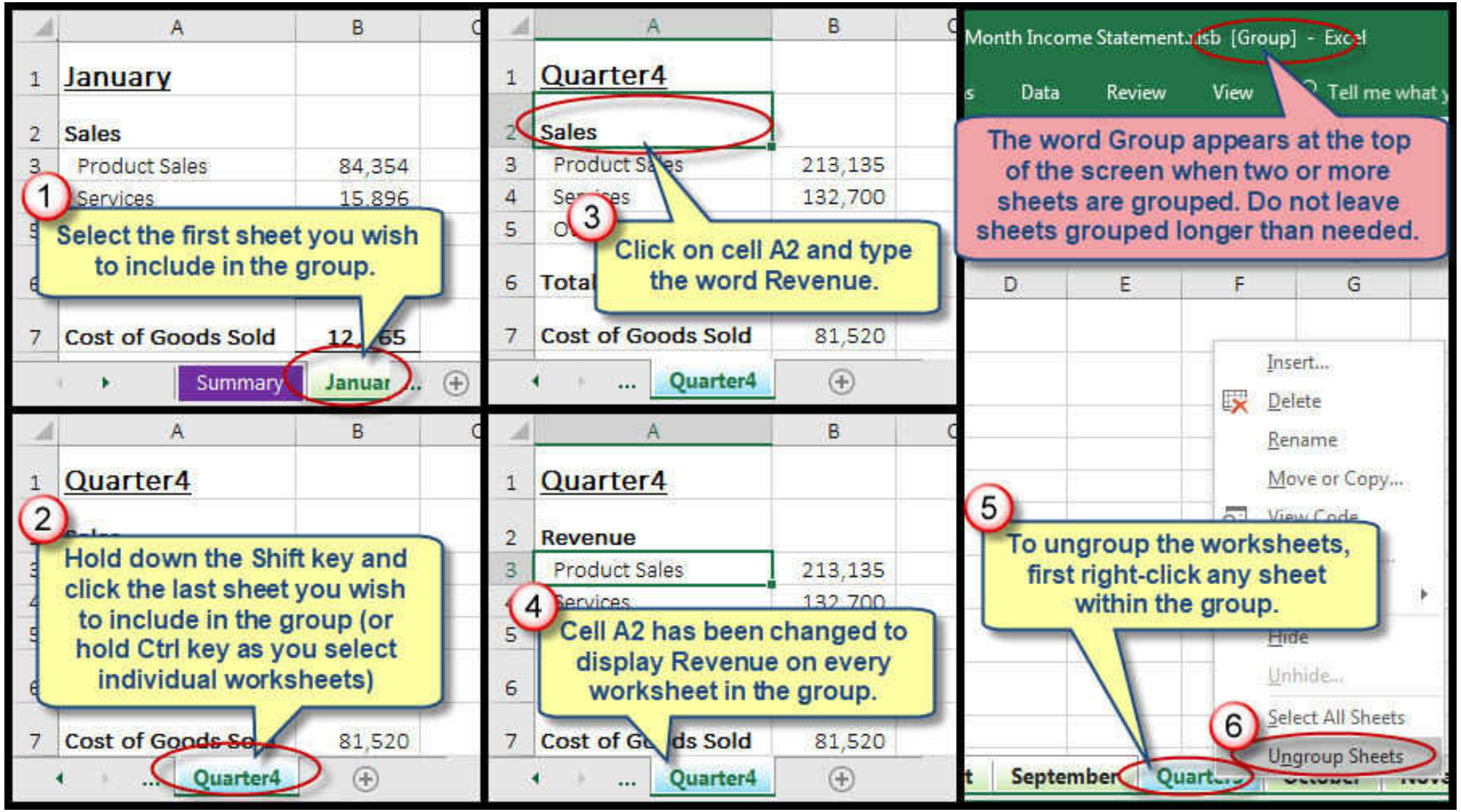


I demonstrate each technique at least twice, first by way of numbered steps in PowerPoint, and then in Excel.

Handouts include PDF of today's presentation along with an example workbook that contains most examples I'll teach from as well as related articles.

If needed, handouts are available at www.davidringstrom.com/irem or email ask@davidringstrom.com

Group Worksheets



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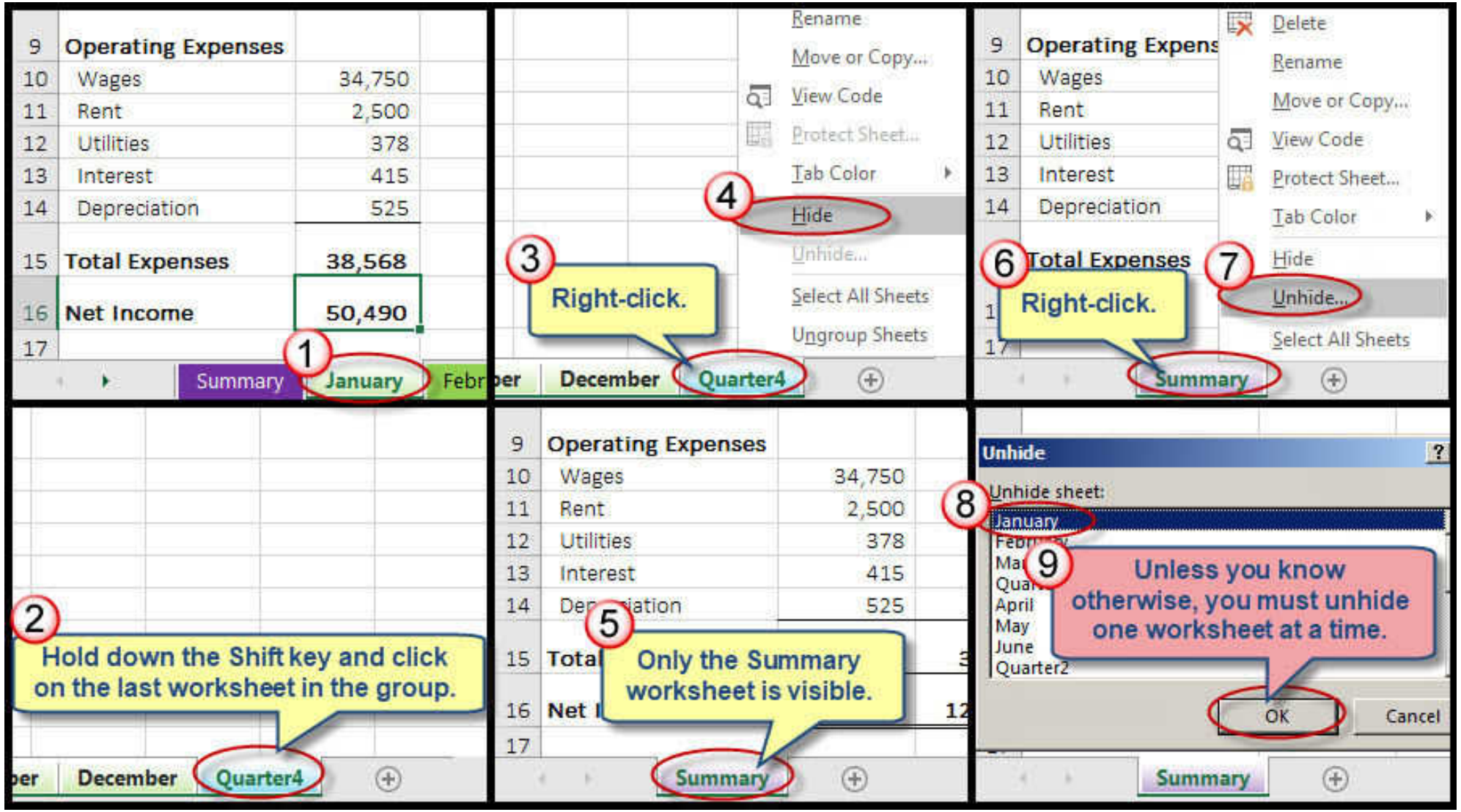
Hiding Multiple Worksheets



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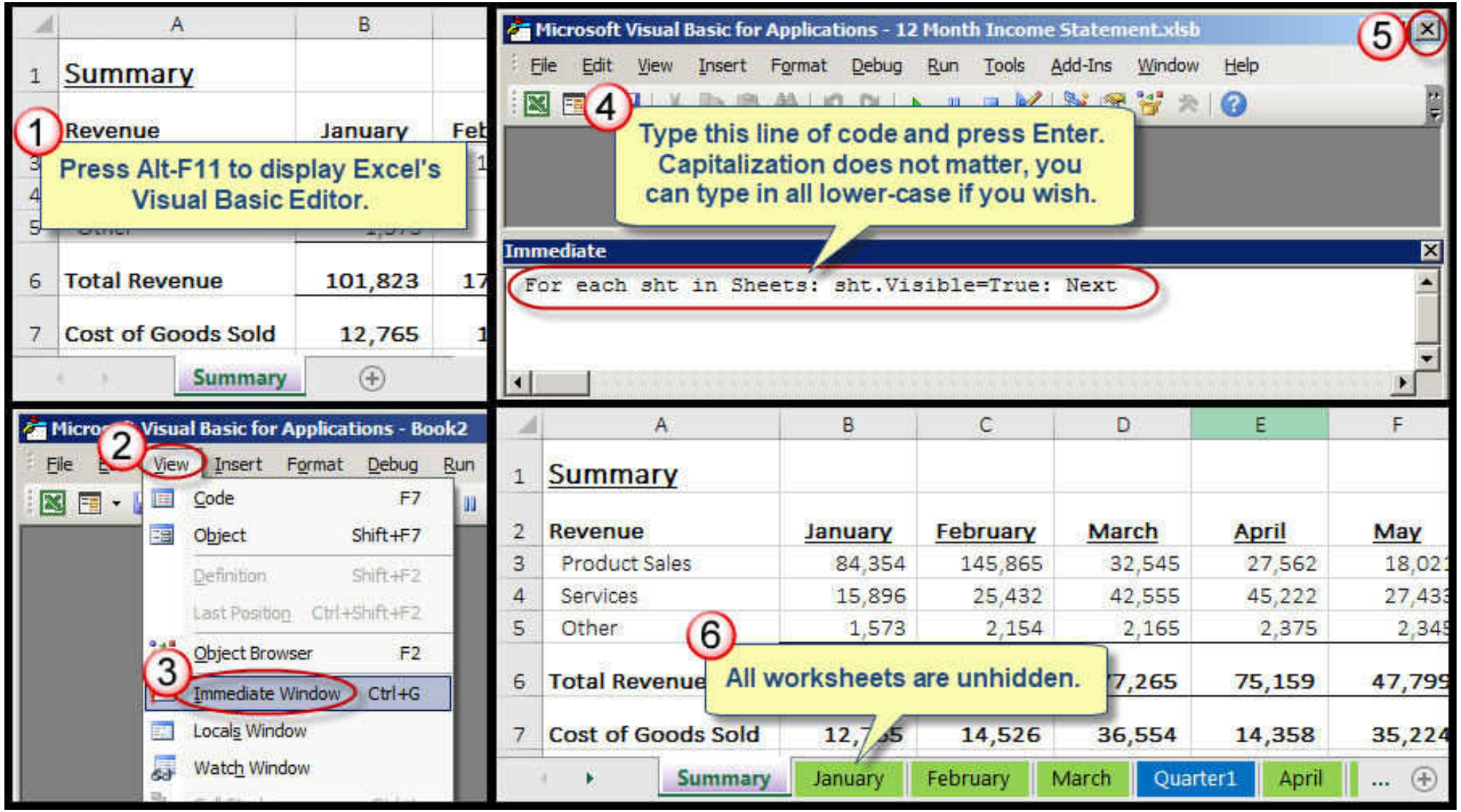
Unhide All Worksheets in a Workbook



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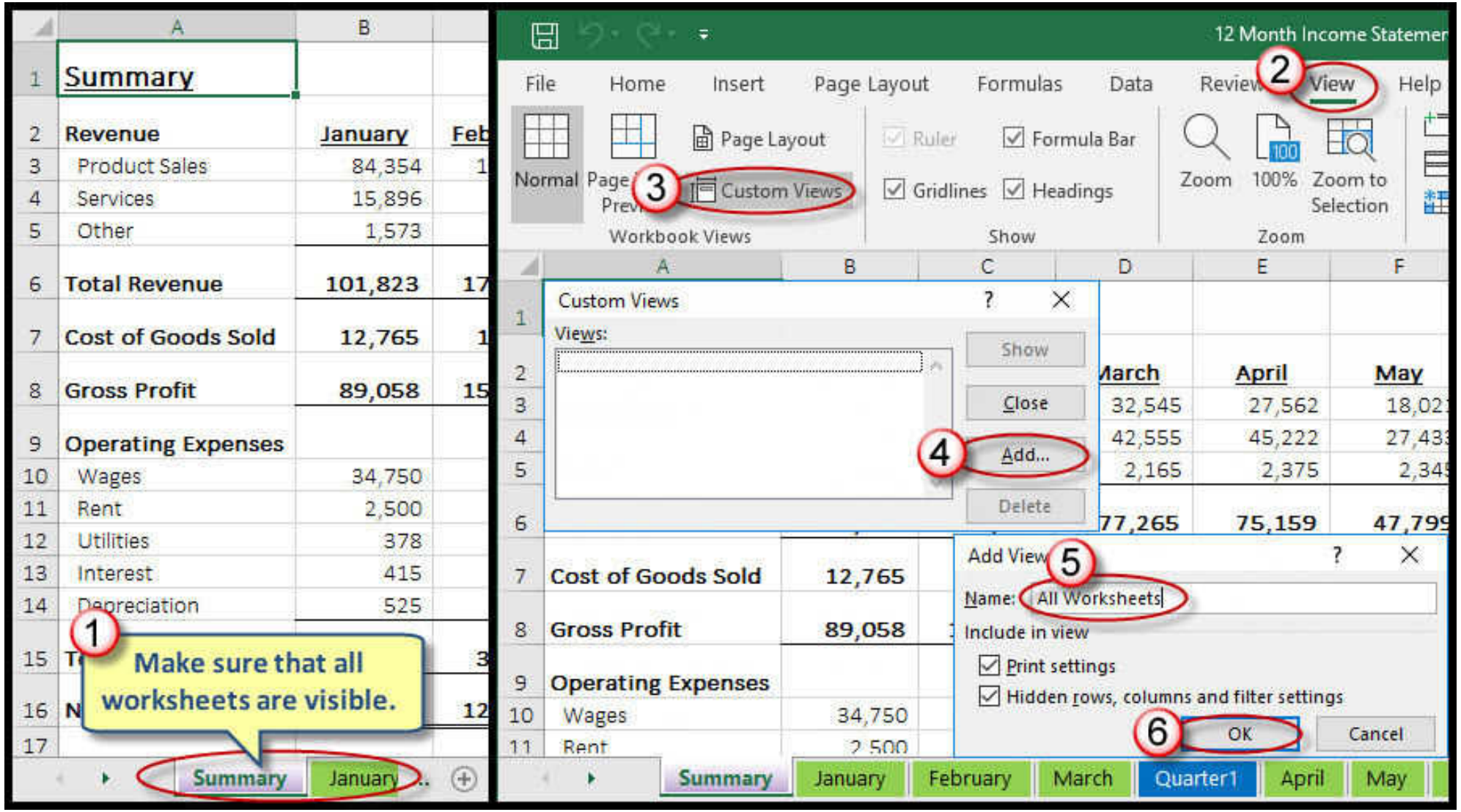
All Worksheets Custom Views



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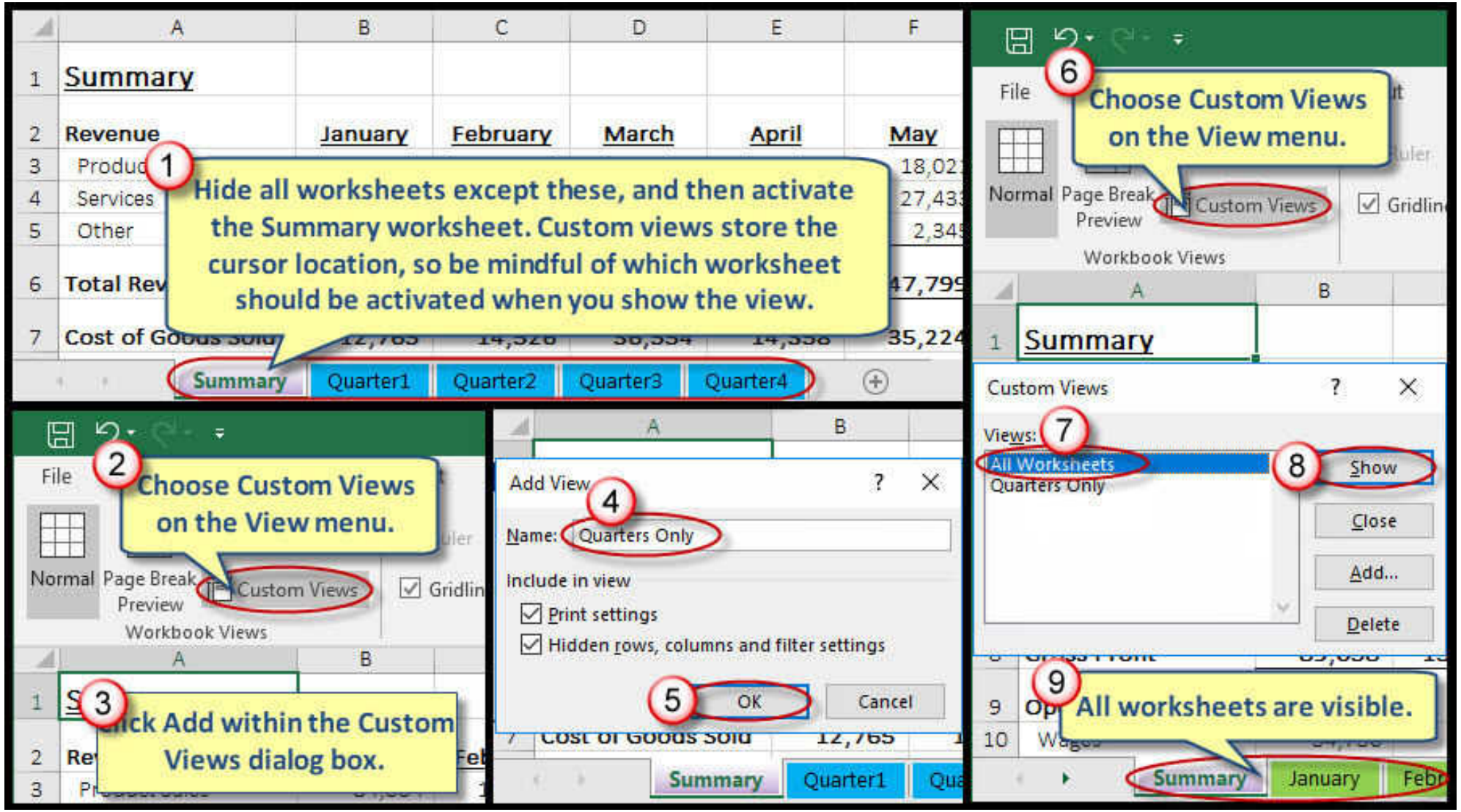
Quarters Only Custom View



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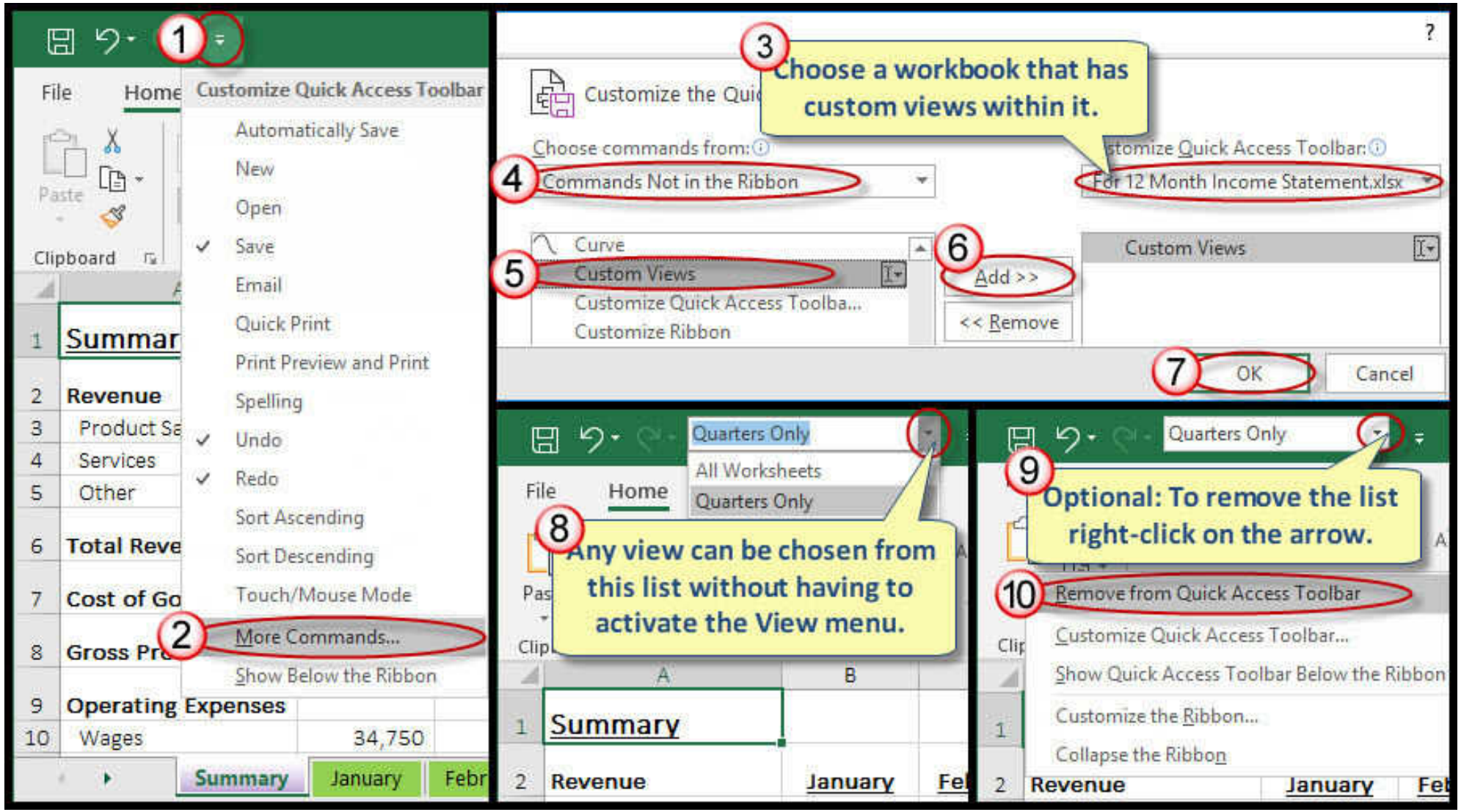
Streamlining Custom Views



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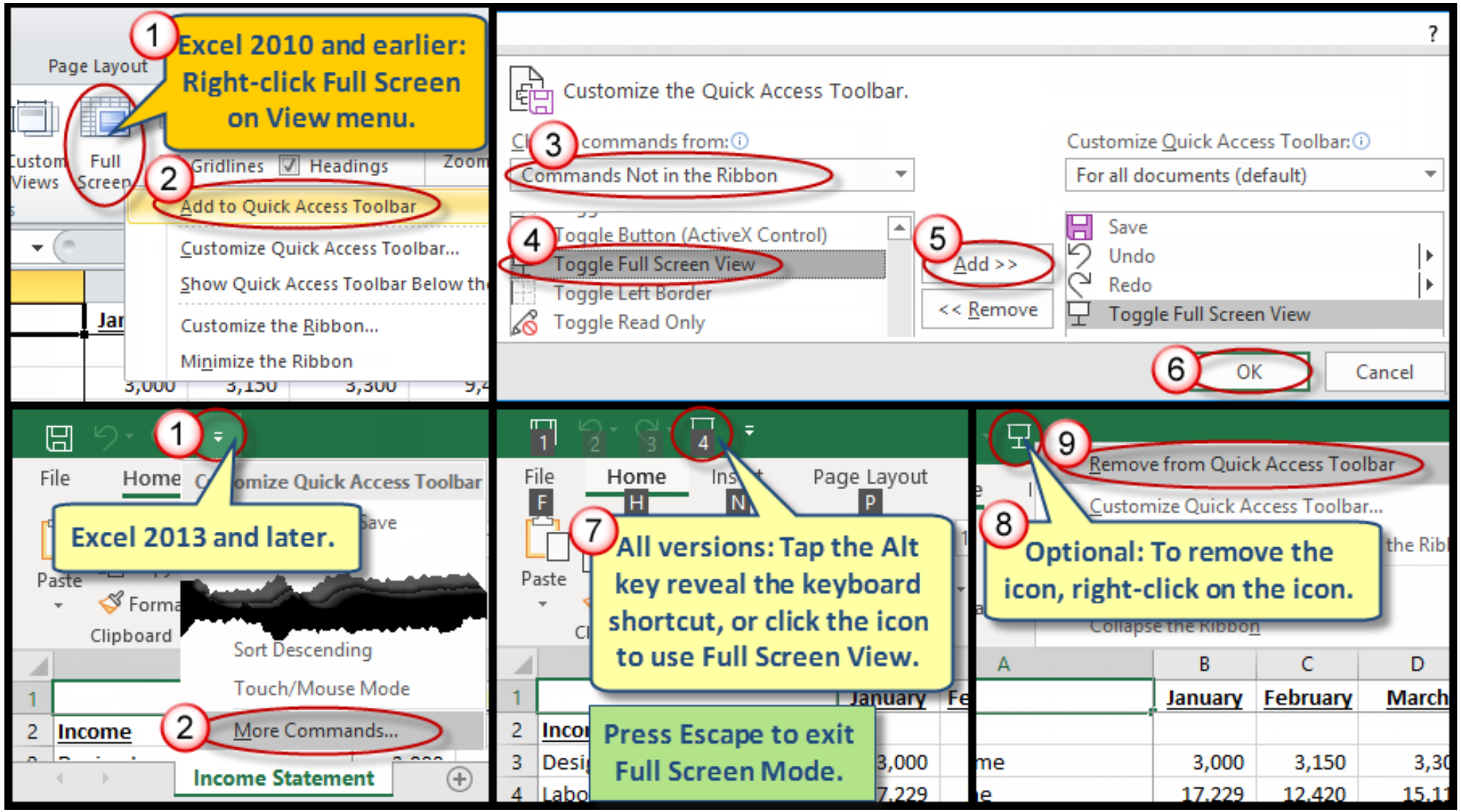
Toggle Full Screen Shortcut



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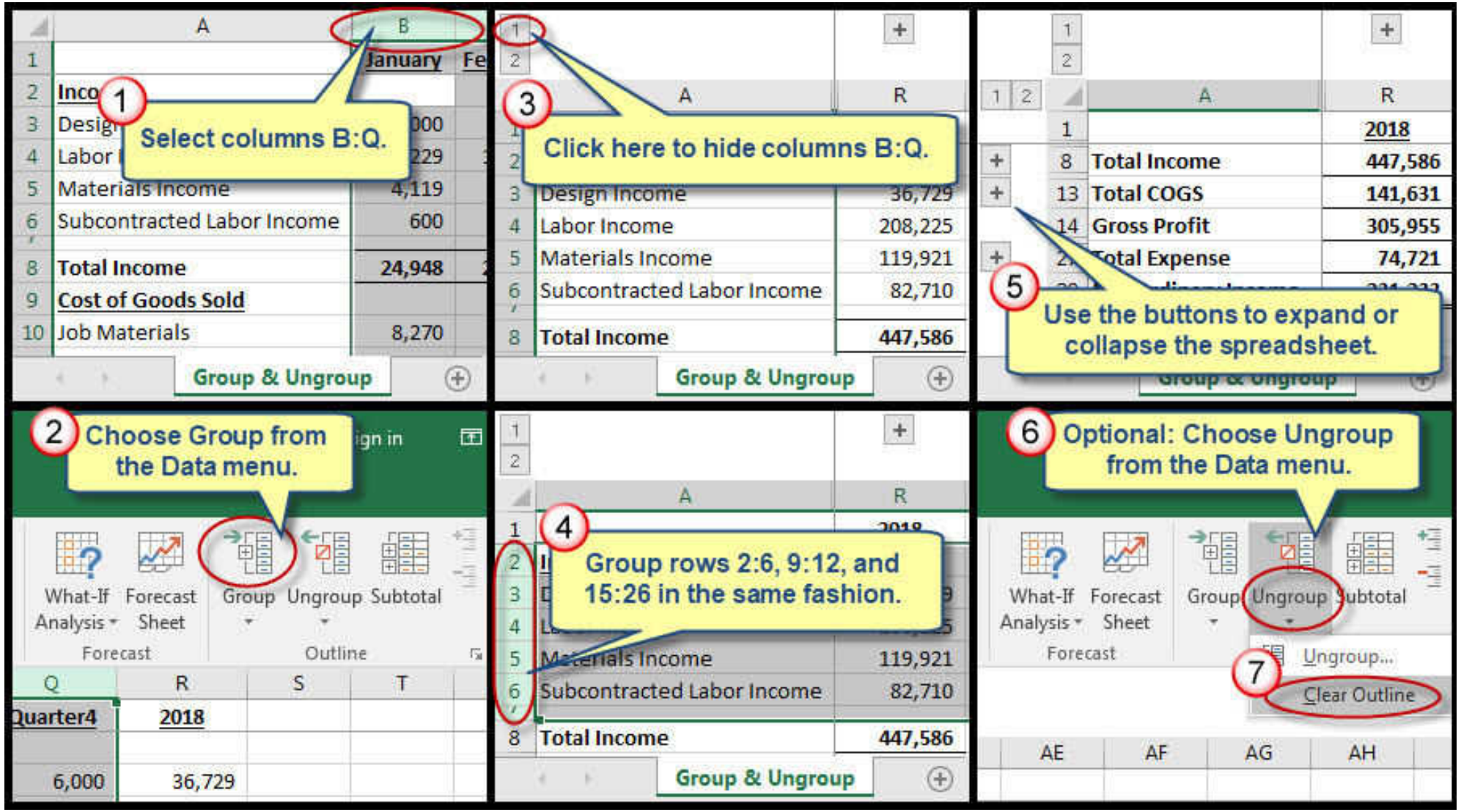
Group and Ungroup Rows and Columns



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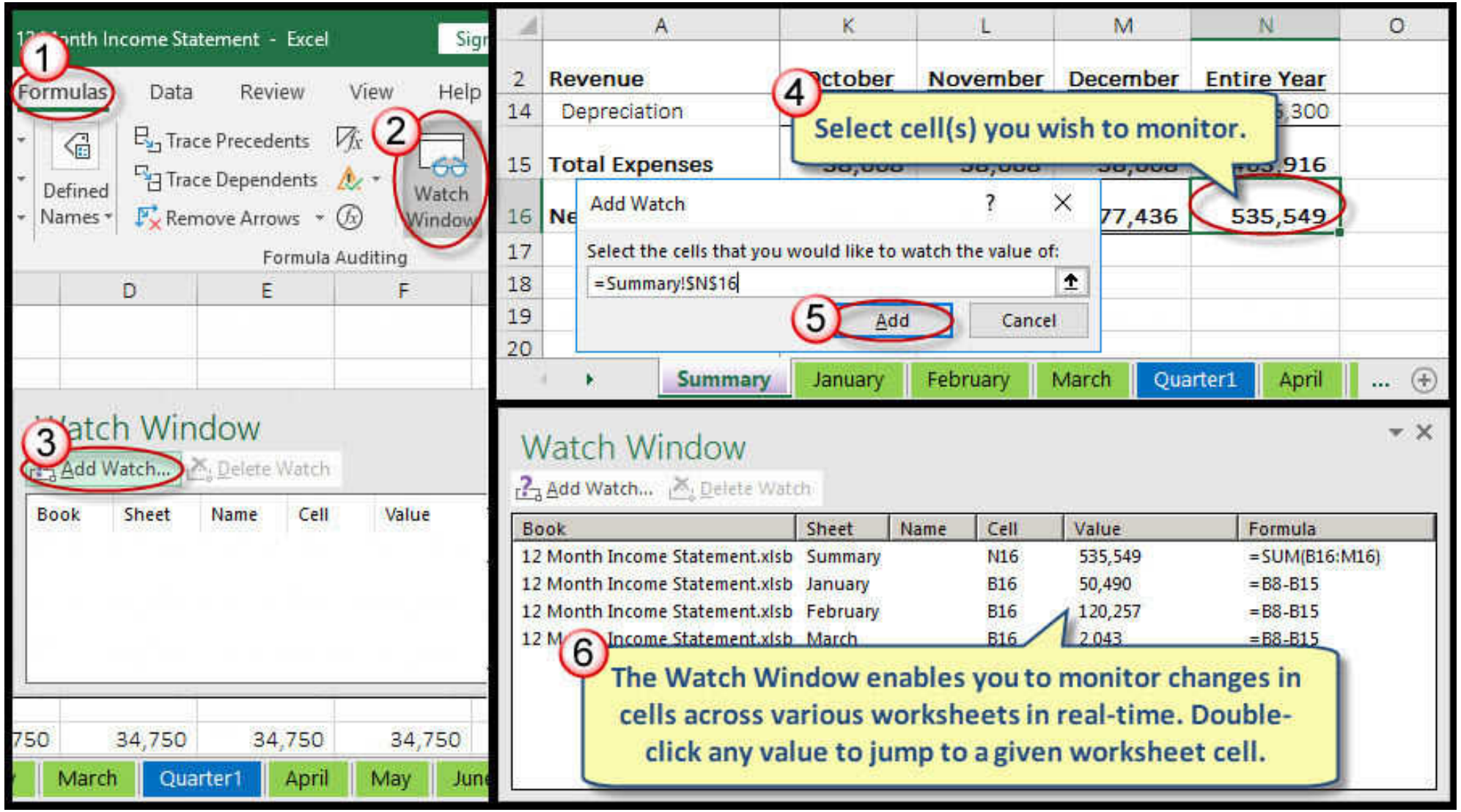
Watch Window



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PMT Function

	A	B
1	Interest	5.25%
2	Term	360
3	Principal	350,000
4	Payment	1,932.71

=-PMT(B1/12,B2,B3)

Excel assumes an outflow, so add a minus sign before PMT to show a positive amount.

=-PMT(B1/12,B2,B3)

rate
B1/12
the interest rate for the loan expressed on same basis as nper, i.e. divide by 12 if term is in months

nper
B2
the length of the loan (in this case in months)

pv
B3
present value of amount being borrowed (or lent)

PMT Function

CUMIPMT Function

	A	B	C	D
1	Interest	5.25%		
2	Term	360		
3	Principal	350,000		
4	Payment	1,933		
5	Total Interest	342,746		
6				
7				
8				

Excel assumes an outflow, so add a minus sign before CUMIPMT to show a positive amount.

=-PMT(B1/12,B2,B3)

=-CUMIPMT(B1/12,B2,B3,1,B2,1)

=-CUMIPMT(B1/12,B2,B3,1,B2,0)

rate	nper	pv	start_period	end_period	type
B1/12	B2	B3	1	B2	0
the interest rate for the loan expressed on same basis as nper, i.e. divide by 12 if term is in months	the length of the loan (in this case in months)	present value of amount being borrowed (or lent)	The month number of the first period in the calculation	The month number of the last period in the calculation	0 (zero) for payments made at the end of a period 1 for payments made at the beginning of a period

CUMIPMT Function

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CUMPRINC Function

	A	B
1	Interest	5.25%
2	Term	360
3	Principal	350,000
4	Monthly Payment	1,932.71
5	Total Interest	345,776.66
6	Year 2 Principal	5,200.61

=-PMT(B1/12,B2,B3)

=-CUMIPMT(B1/12,B2,B3,1,B2,0)

=-CUMPRINC(B1/12,B2,B3,13,24,0)

=-CUMPRINC(B1/12,B2,B3,13,24,0)

rate	nper	pv	start_period	end_period	type
B1/12	B2	B3	13	24	0
The interest rate for the loan divided by 12 because Excel uses monthly interest rates.	The length of the loan in months	The loan amount	In this case the first month of year 2	In this case the last month of year 2	- 0 (zero) for payments made at the end of a period - 1 for payments made at the beginning of a period

CUMPRINC Function

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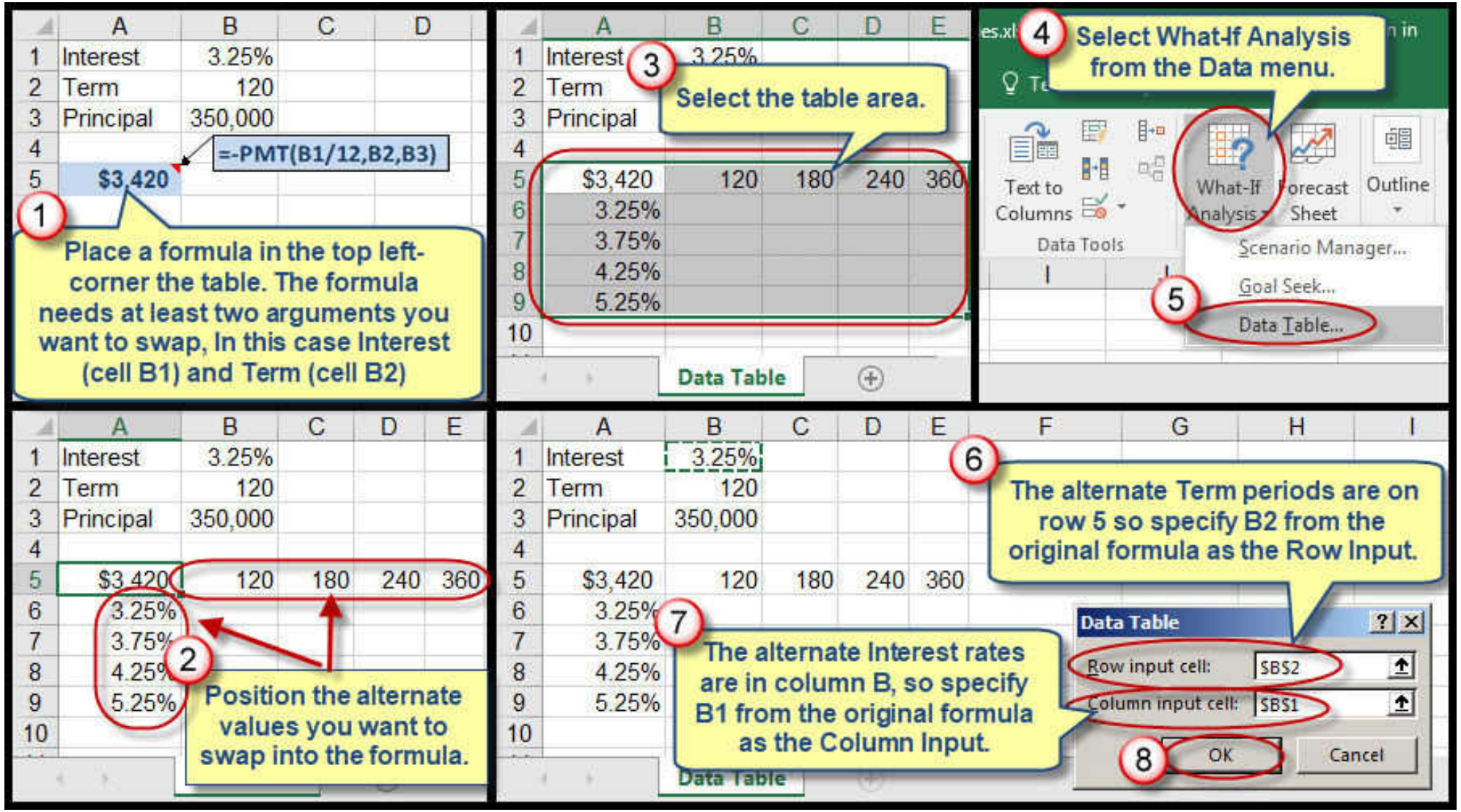
Data Table – Two Variables



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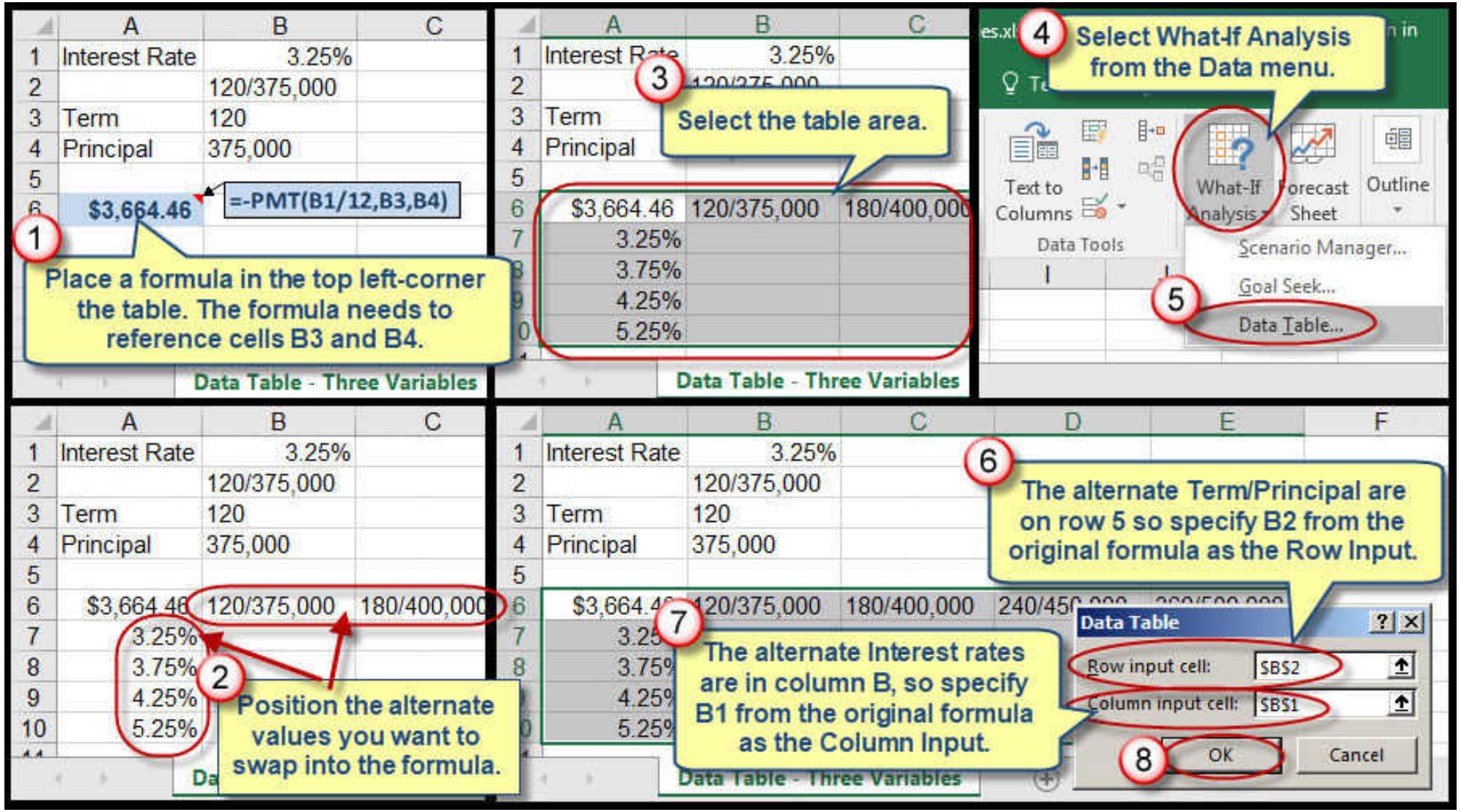
Data Table – Three Variables



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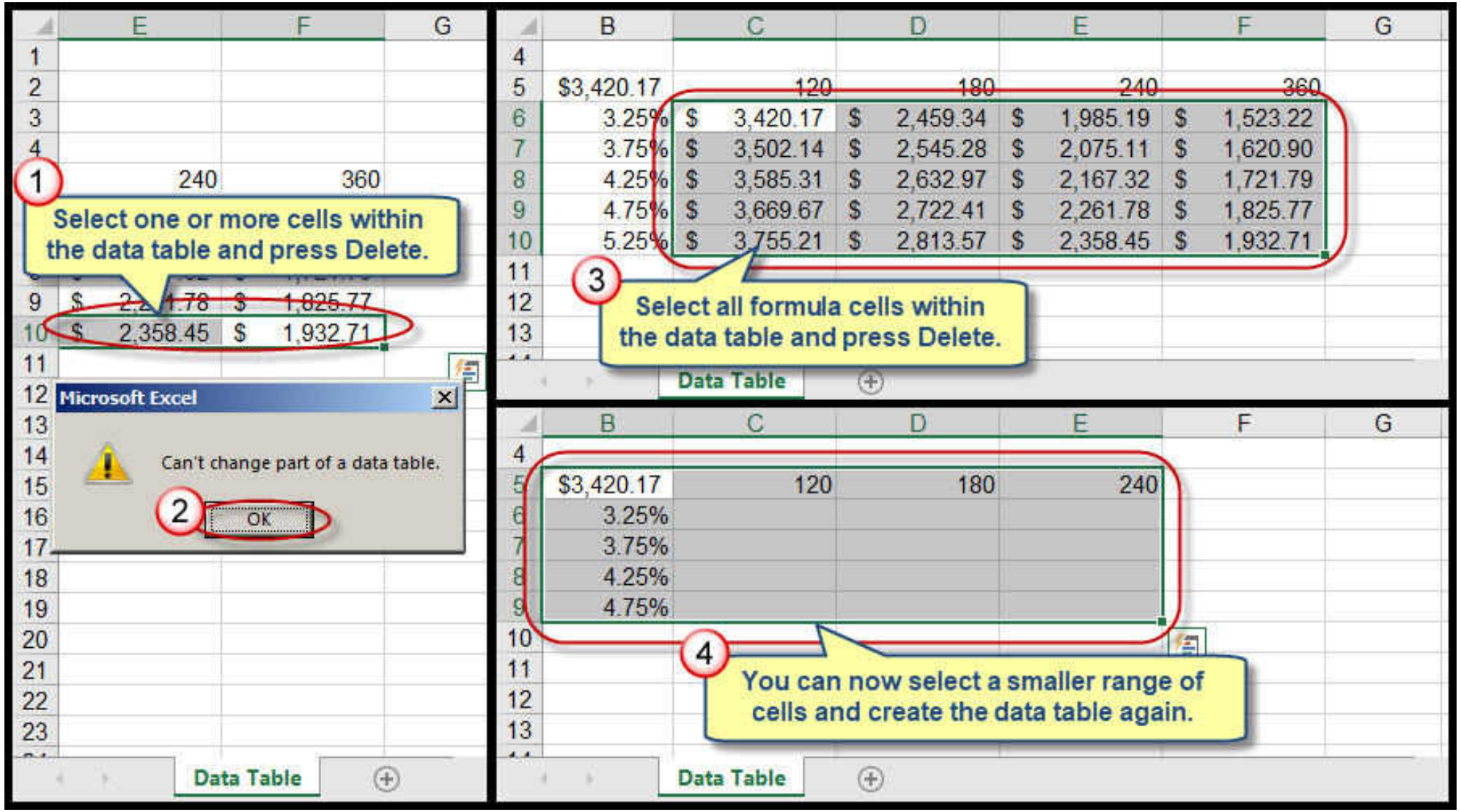
Resizing Data Tables



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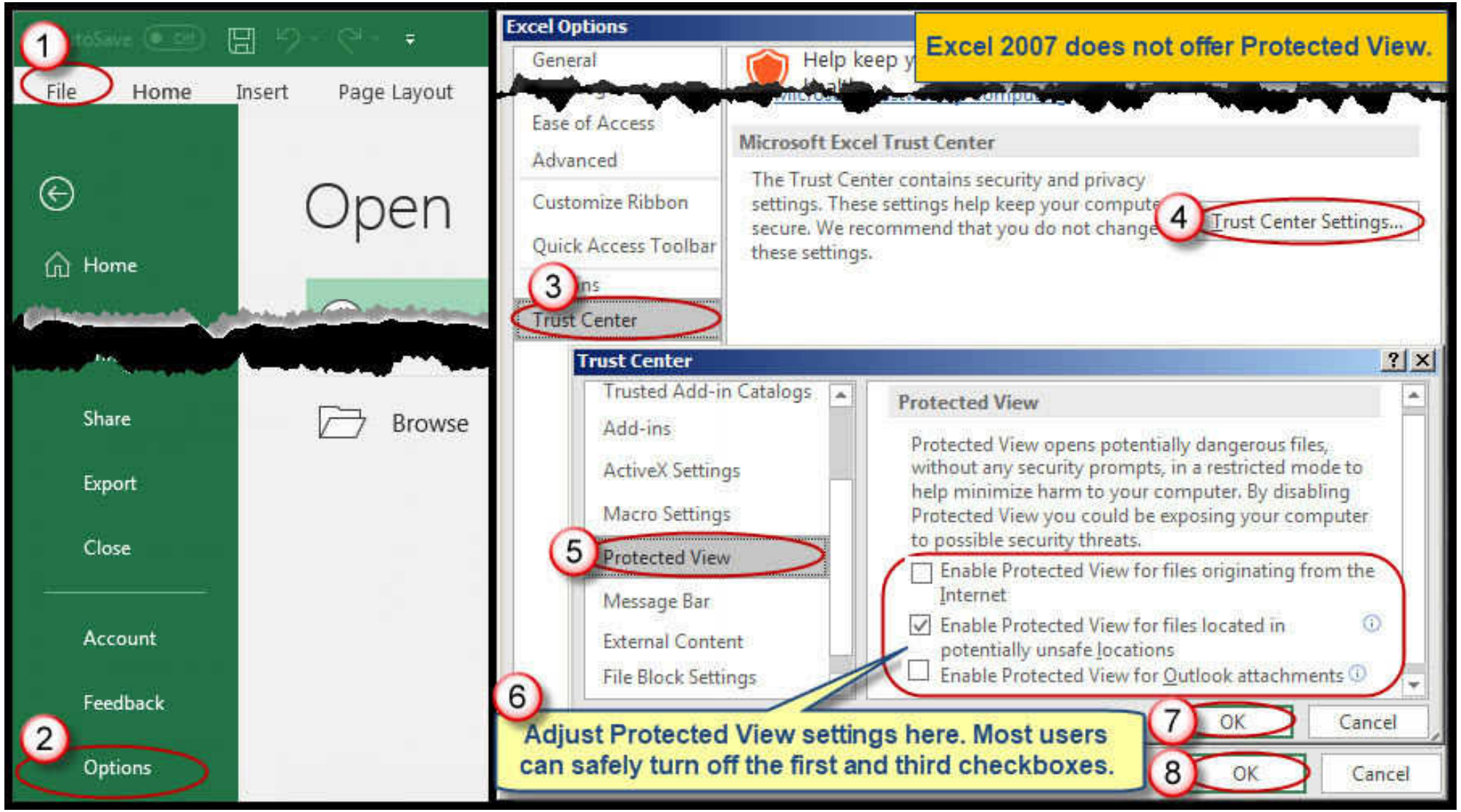
Protected View Settings



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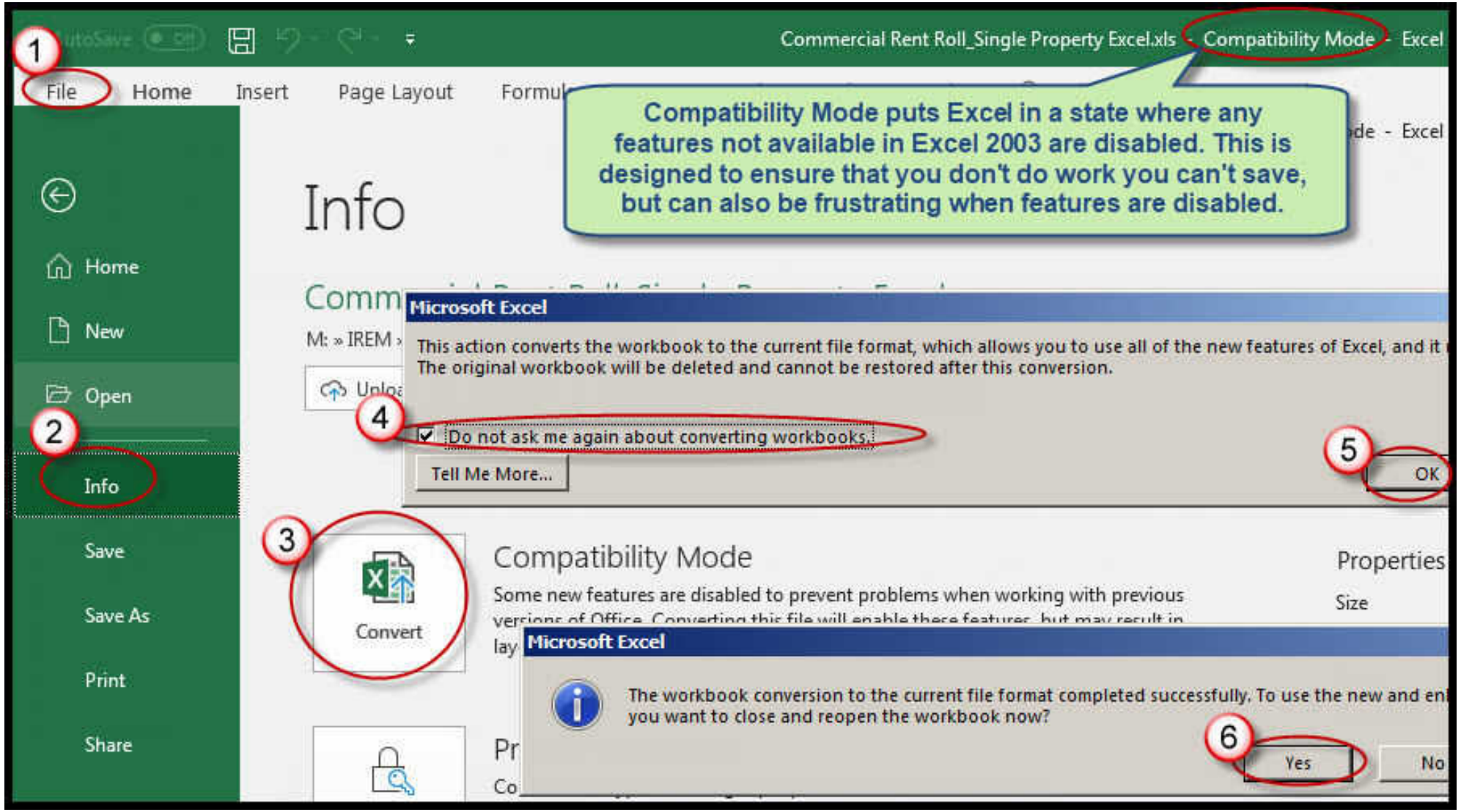
Convert XLS Workbooks



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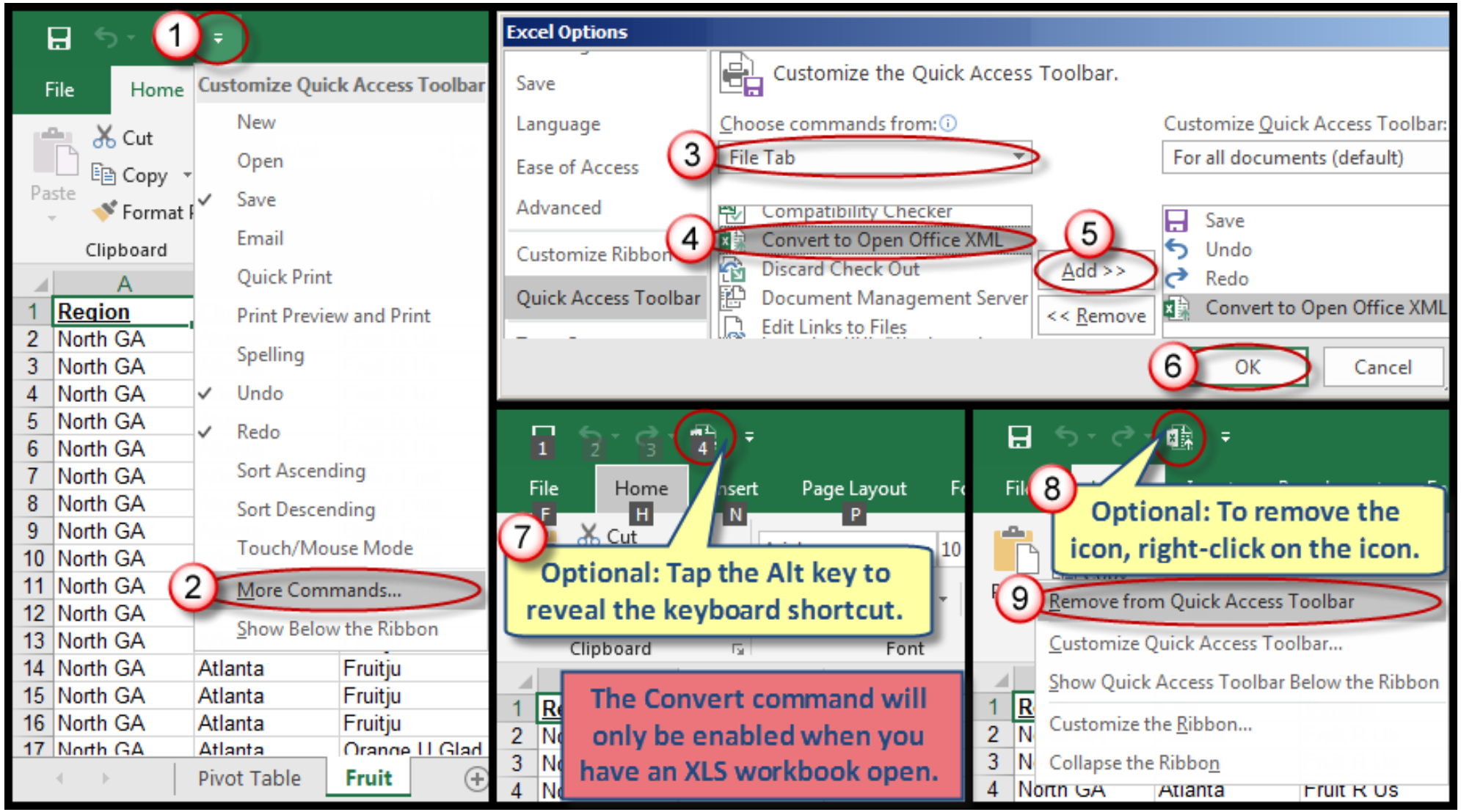
Streamlining XLS File Conversion



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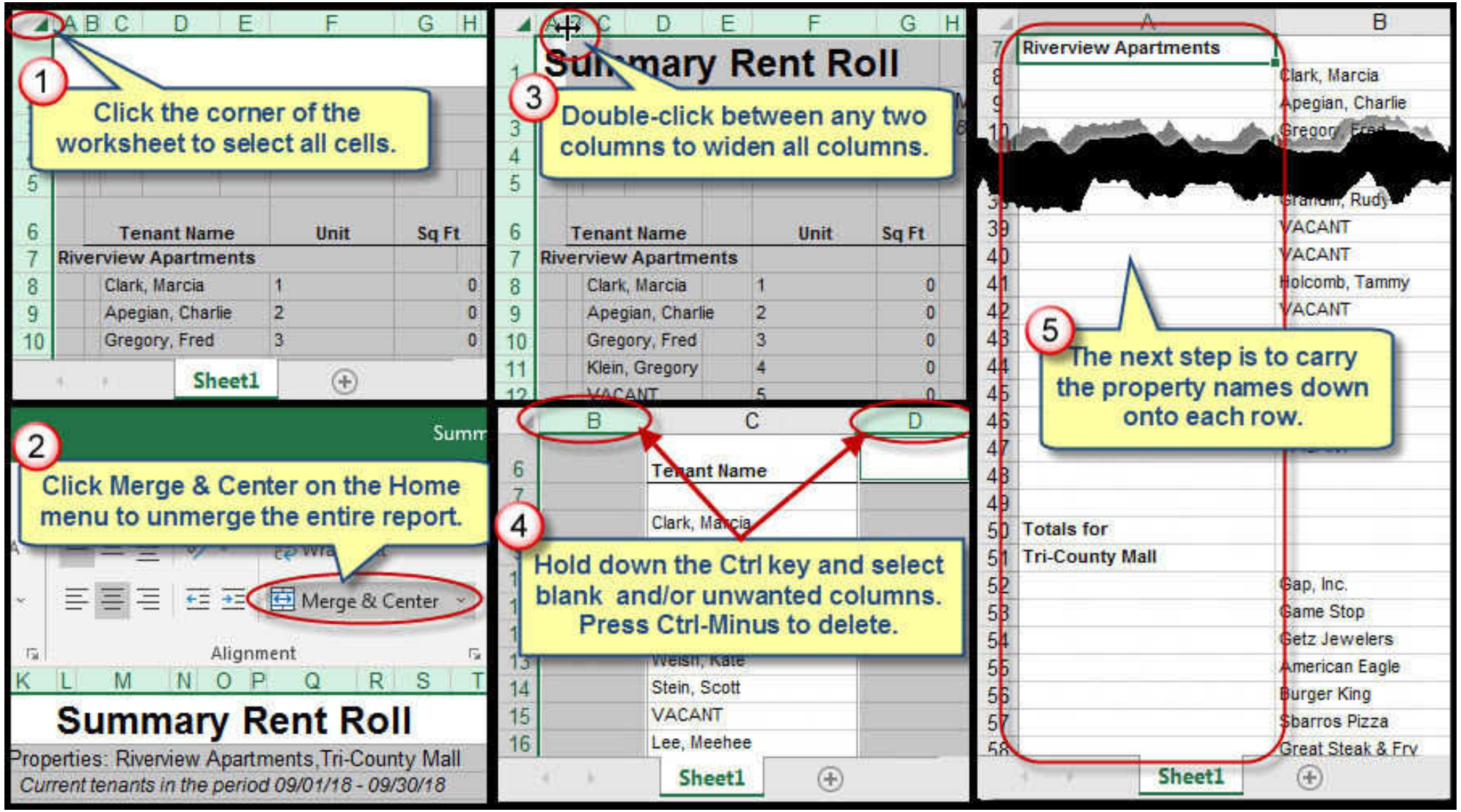
Cleaning Property Management Reports



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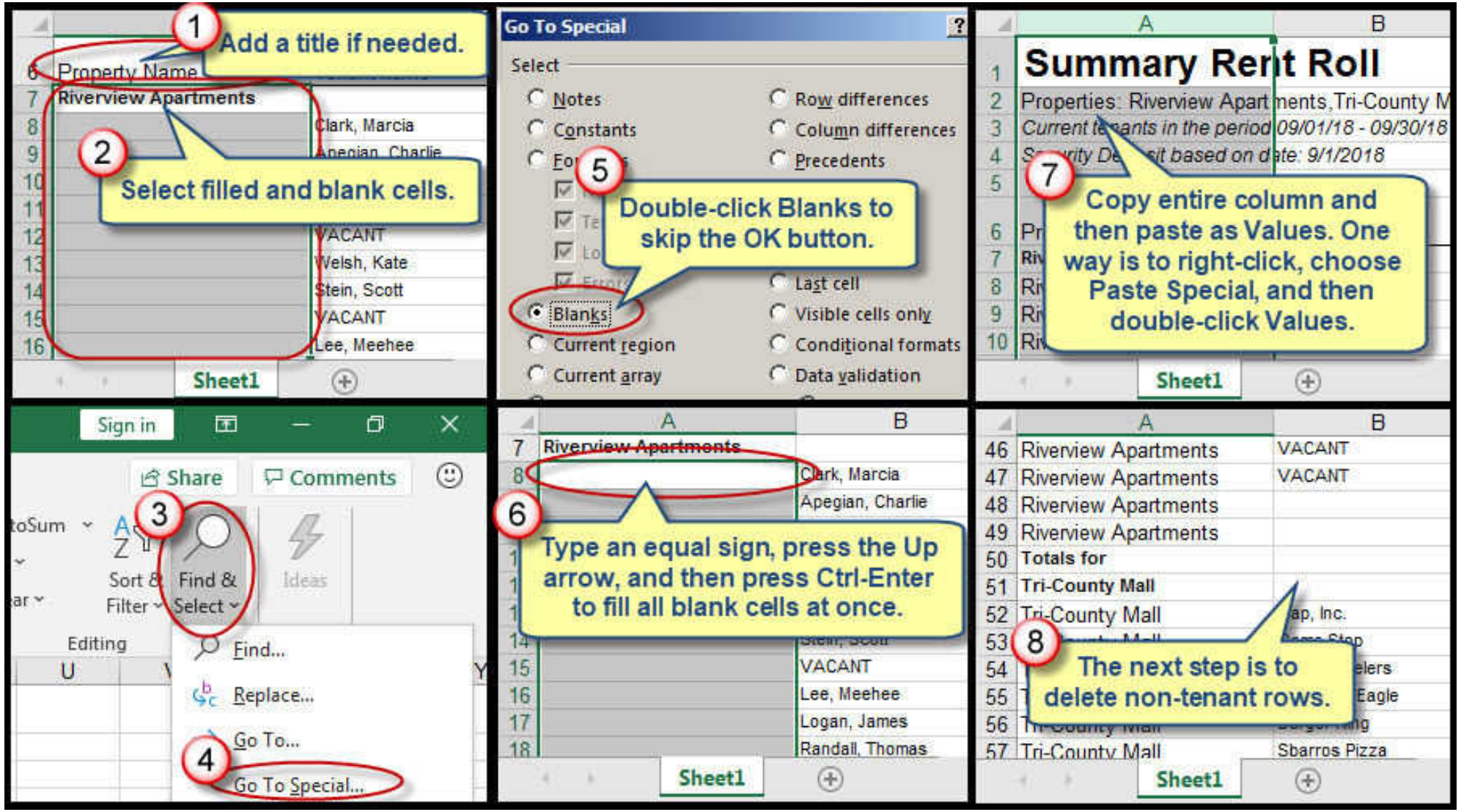
Cleaning Property Management Reports



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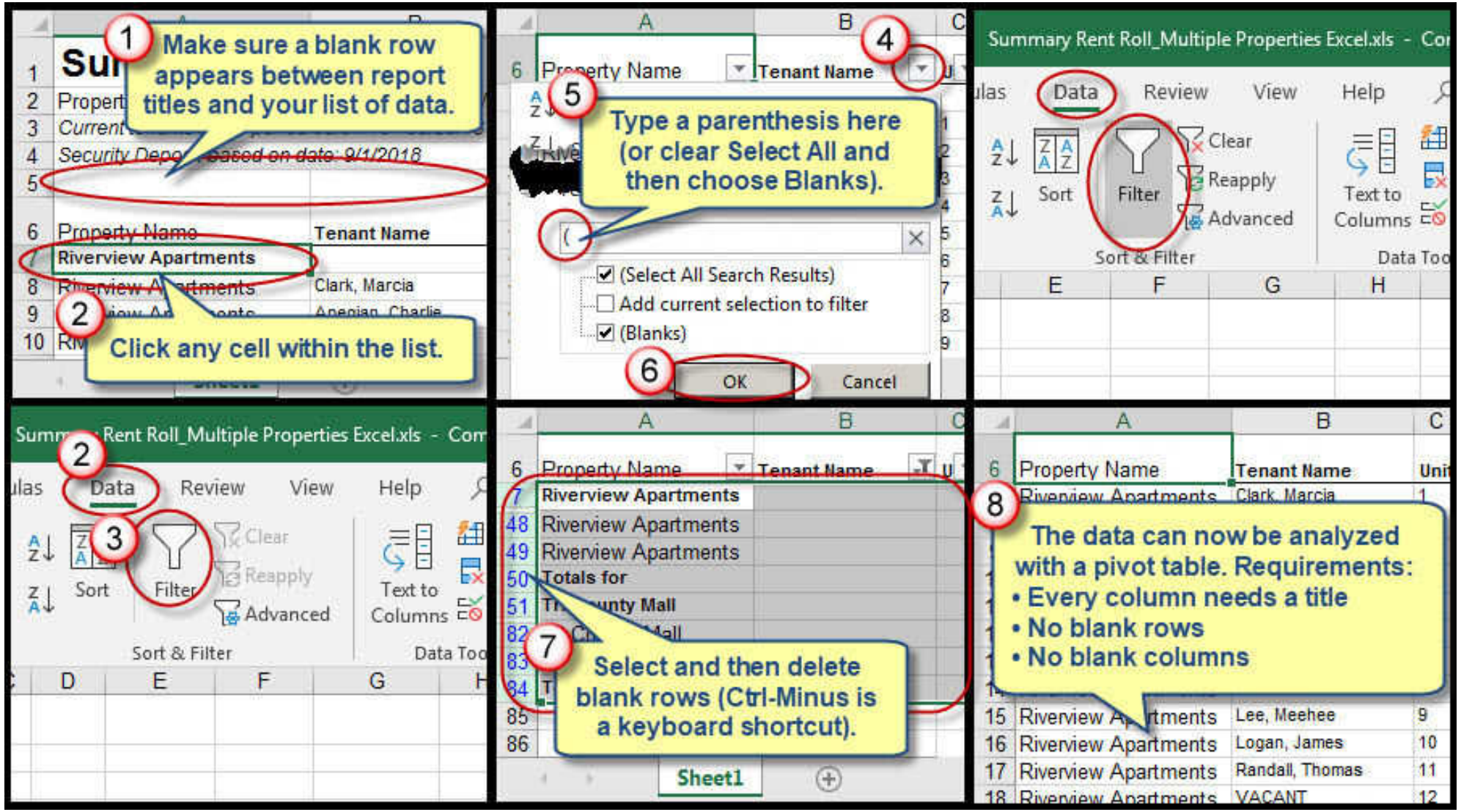
Cleaning Property Management Reports



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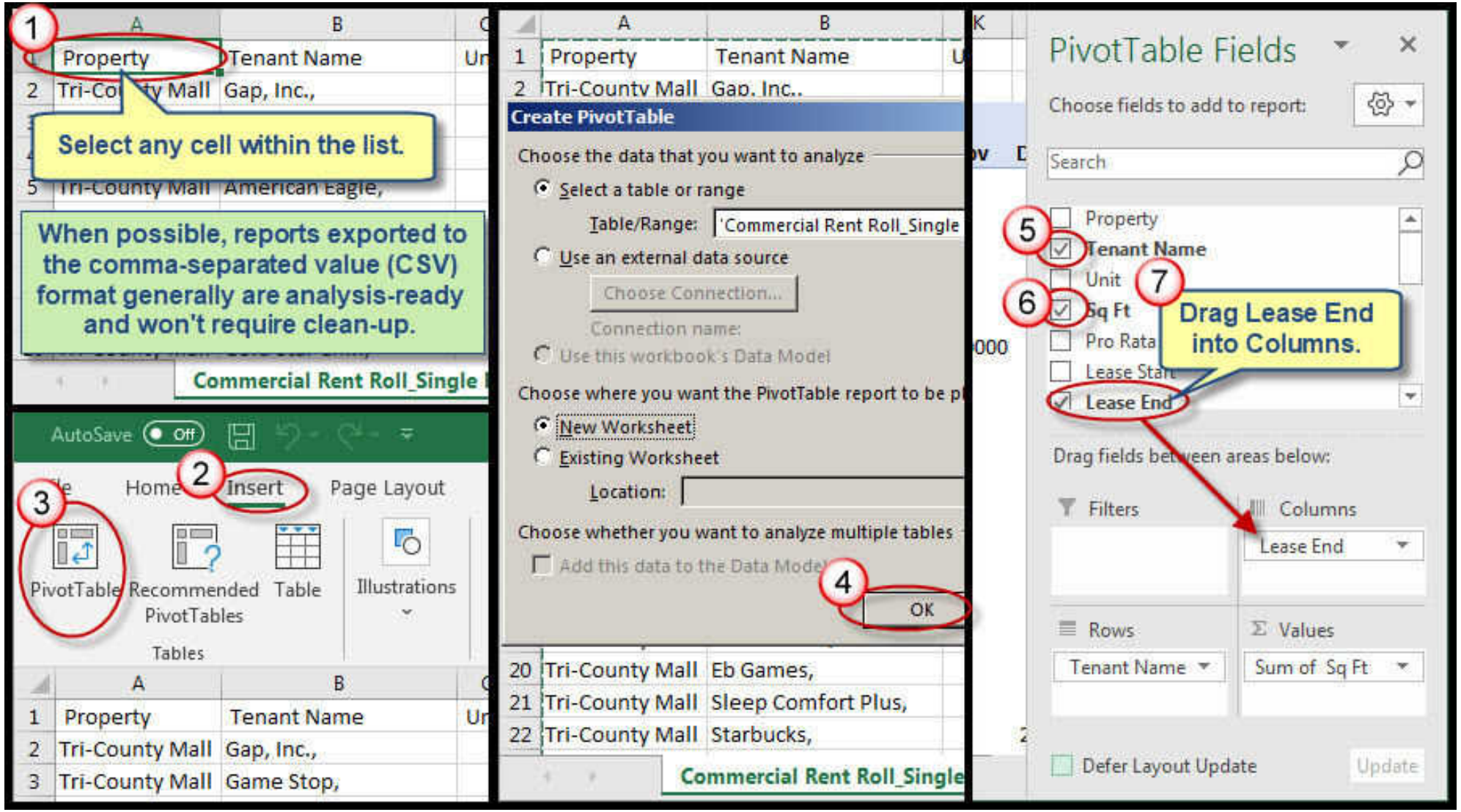
PivotTable-based Vacancy Schedule



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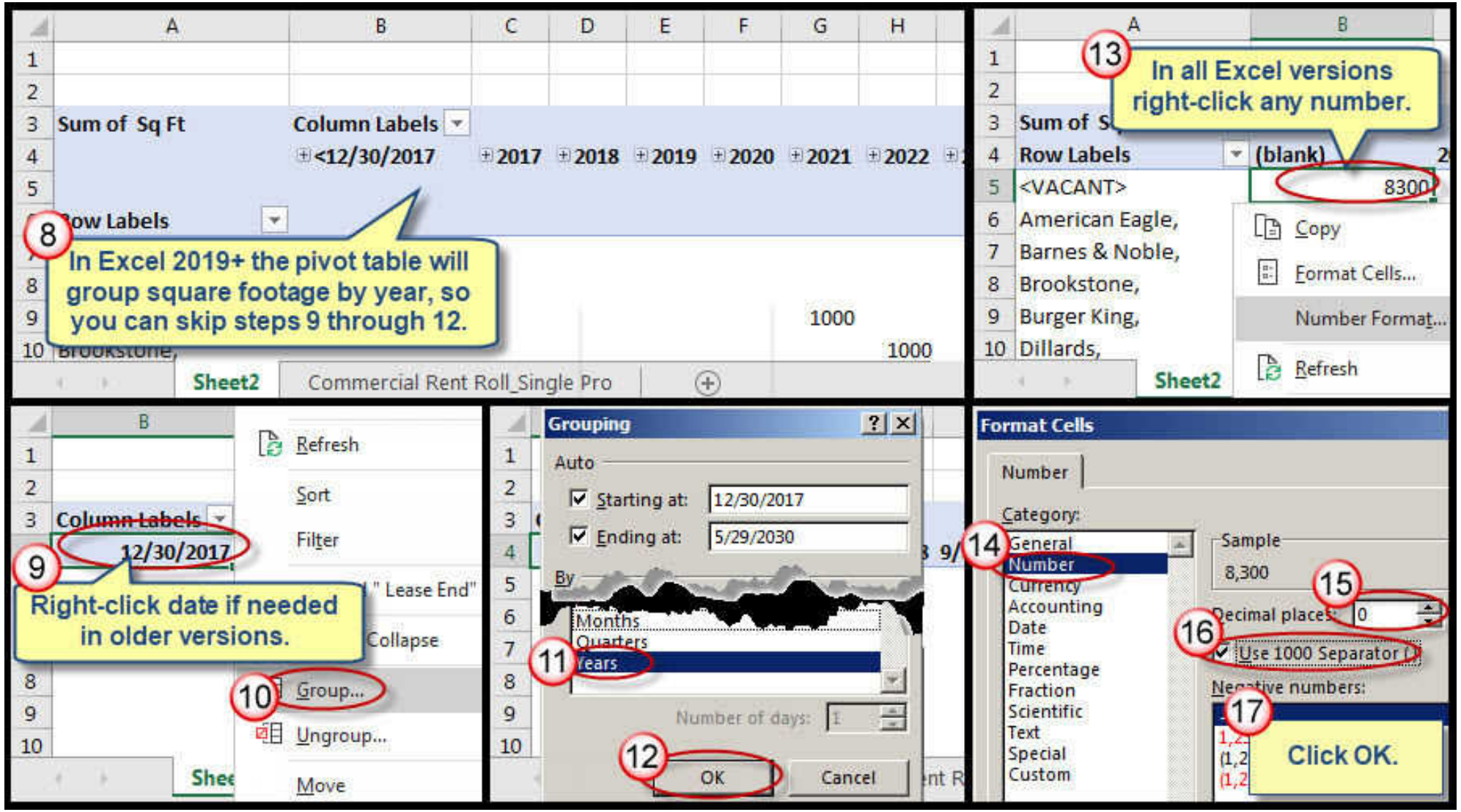
PivotTable-based Vacancy Schedule



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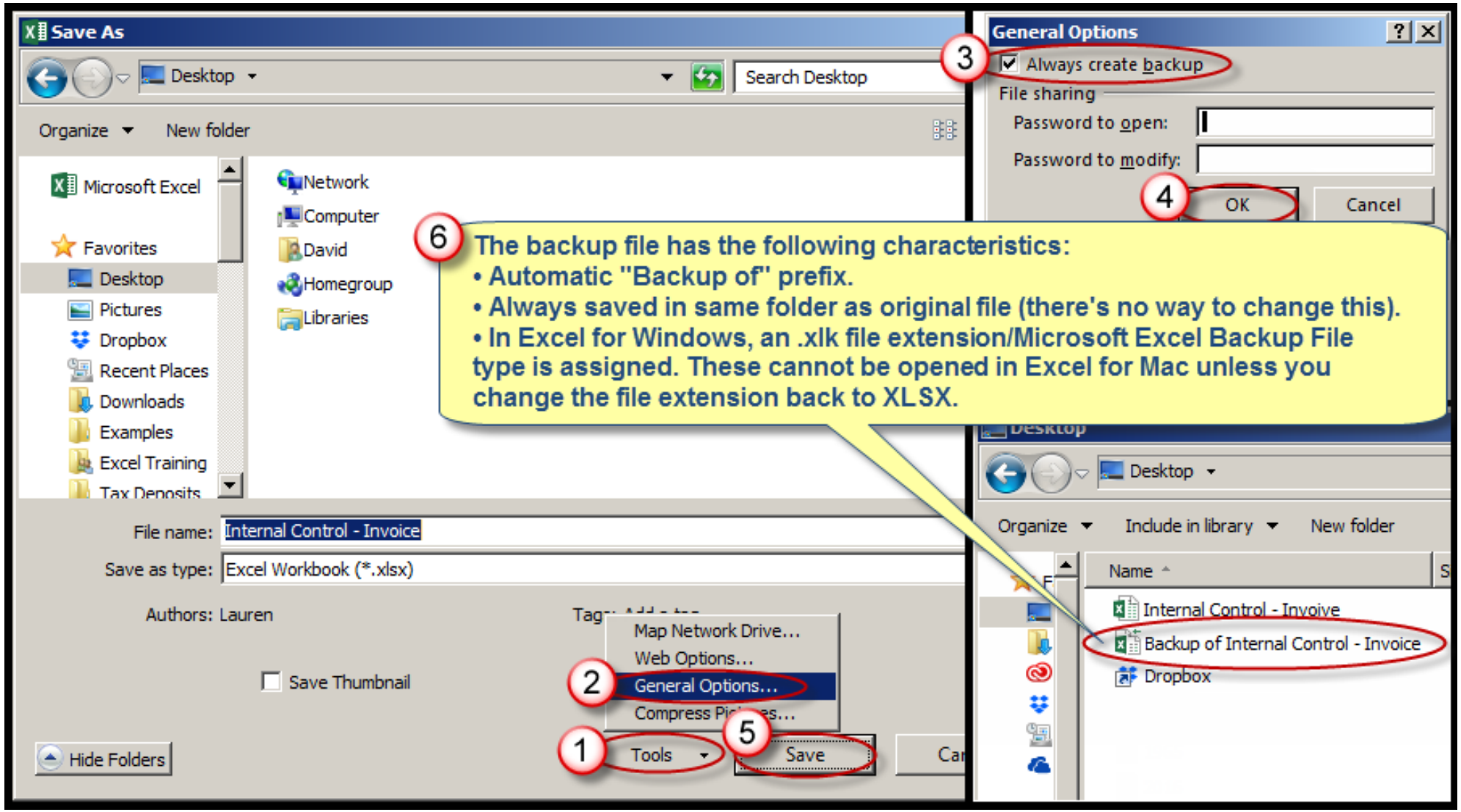
Automatic Backup of Key Excel Workbooks



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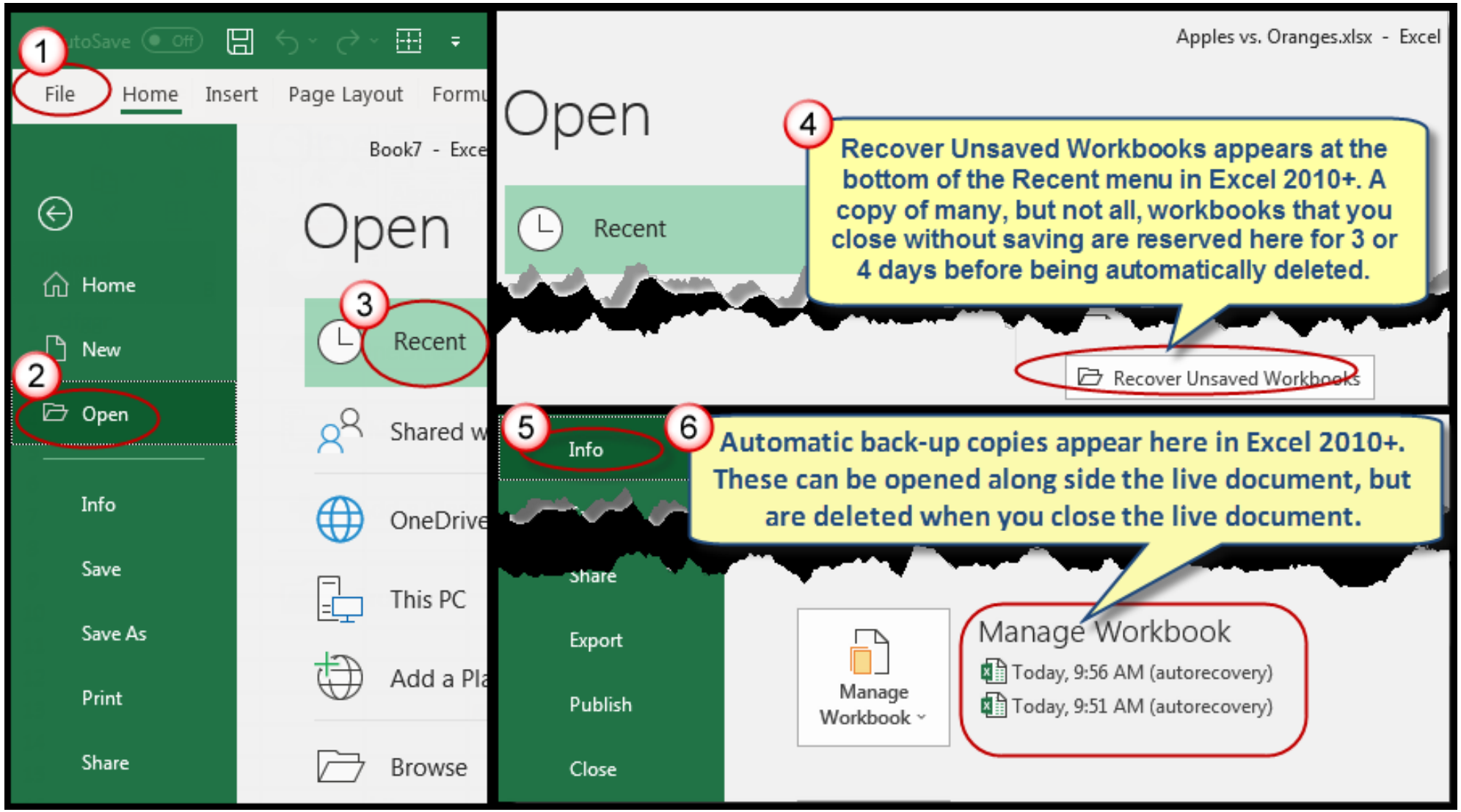
AutoRecover Spreadsheets



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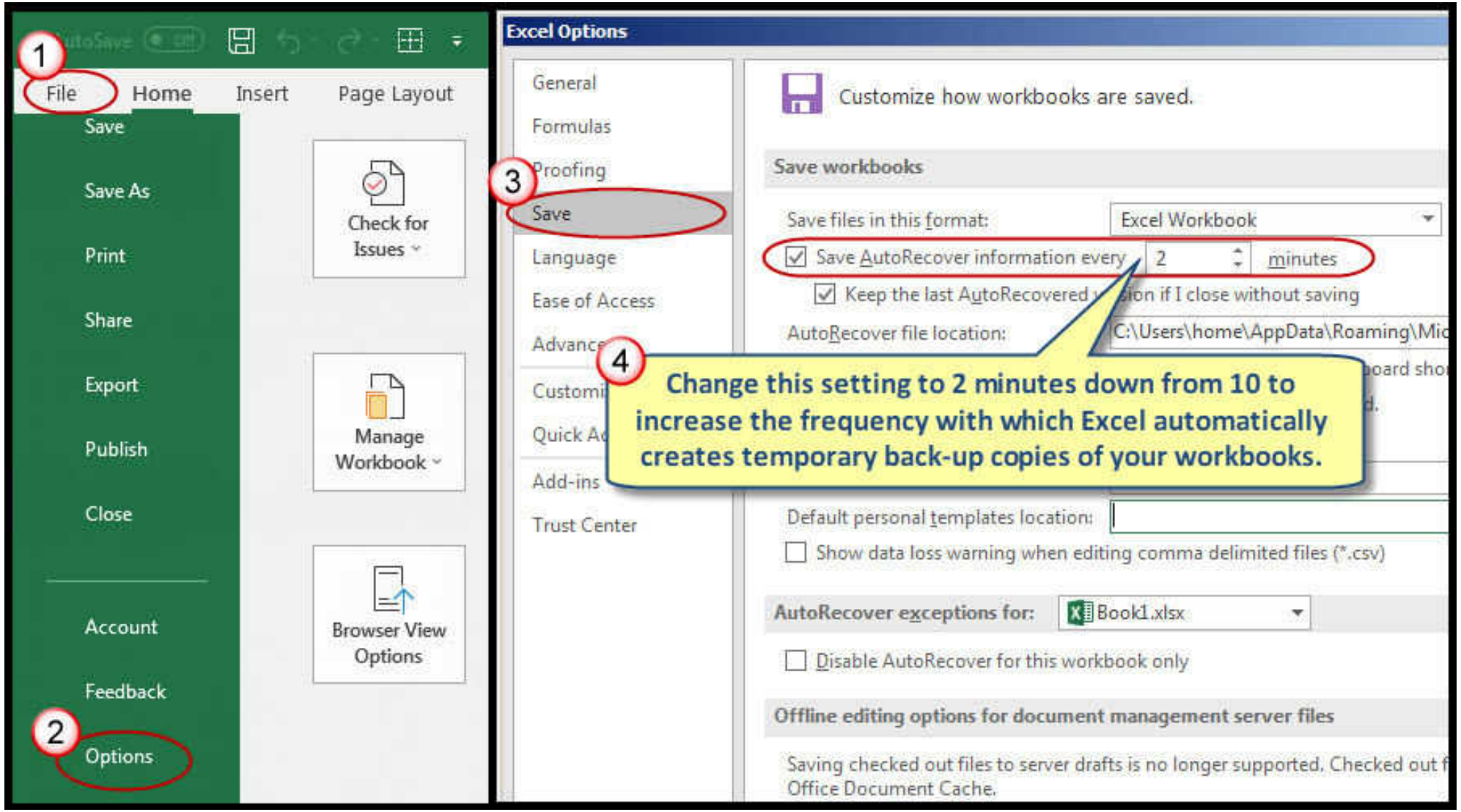
AutoRecover Settings



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Thank You

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