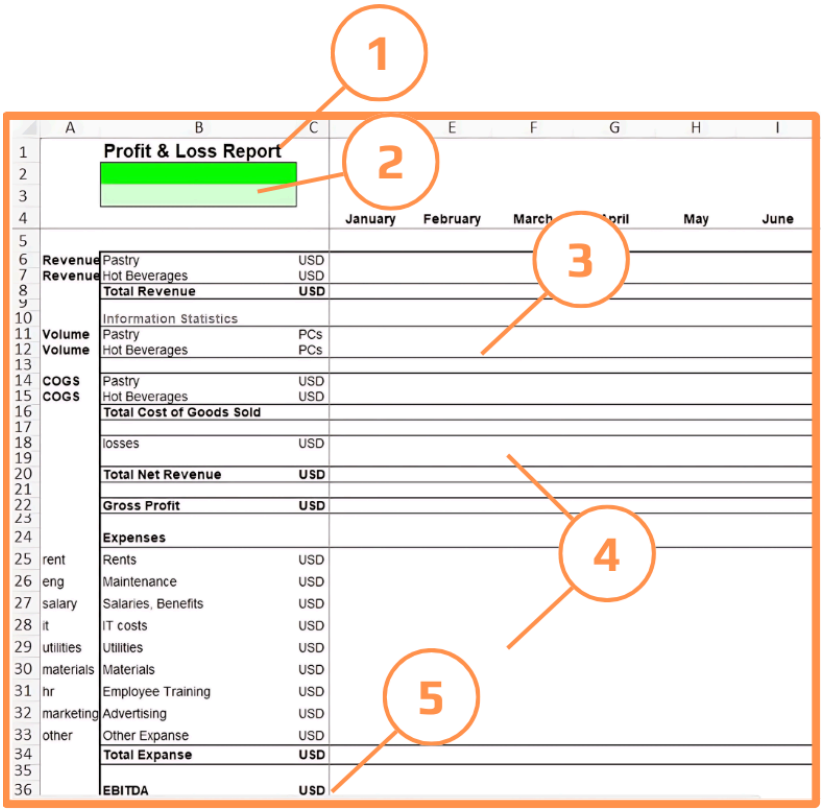
Excel for Business Automation

Dropdown List

Profit & Loss Report Structure

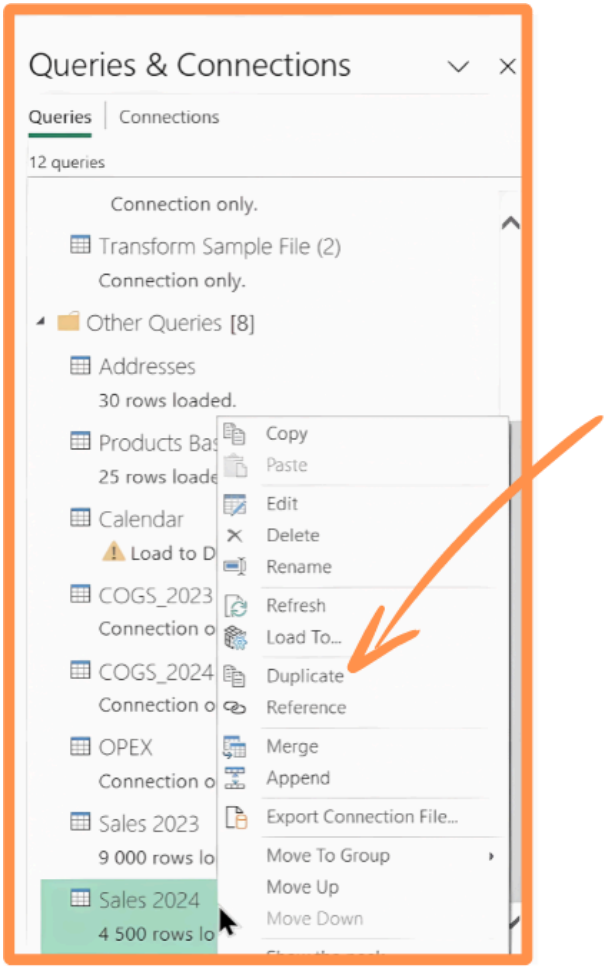
1. Report Title;
2. Cells for a dropdown list containing all bakeries and their corresponding managers;
3. Relevant calculations from the **Sales 2024** table for two PL Group categories: **Pastry** and **Hot Beverage**;
4. Calculations from the **OPEX** table;
5. Final EBITDA calculation.

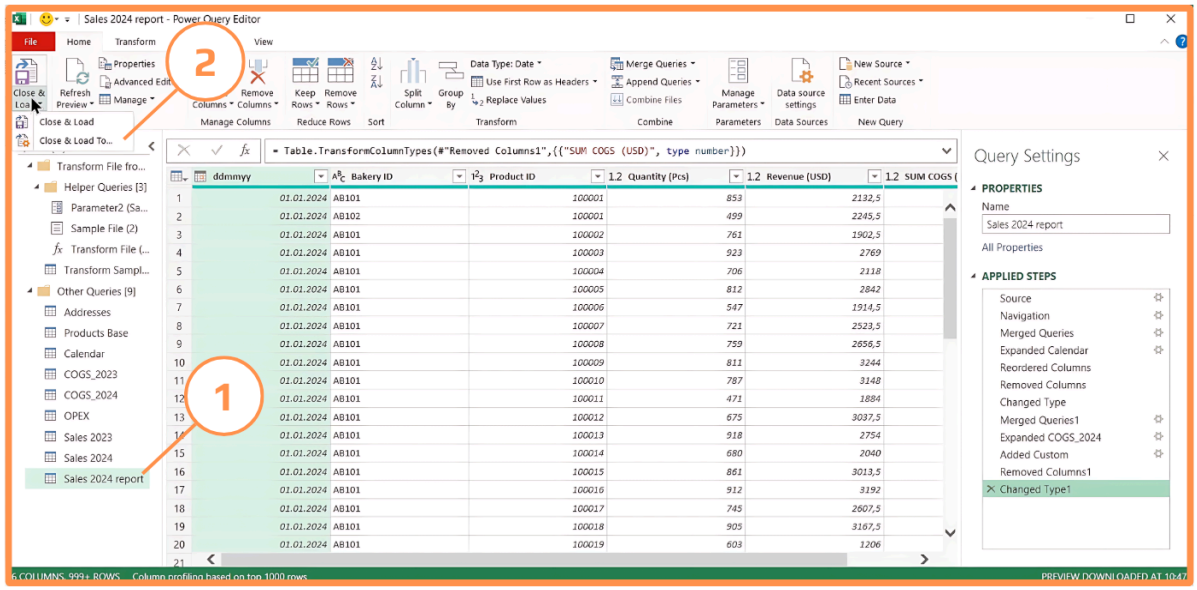


Duplicate Sales Table and Load to the Sheet

First, open the **Data** tab and navigate to **Queries & Connections**. In this tab, scroll down to the **Sales 2024** table and create a duplicate by selecting the appropriate action from the right-click menu. We've now moved to the Power Query window,

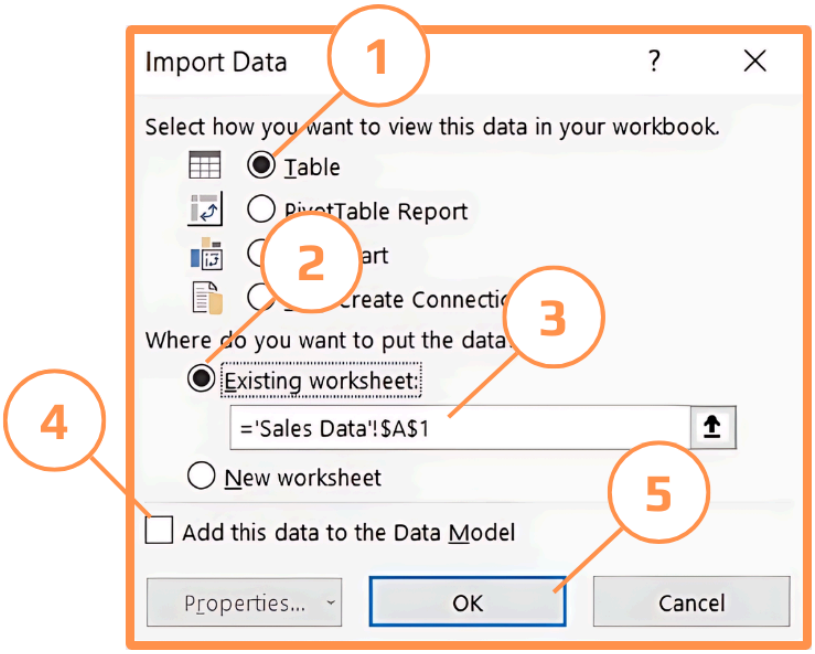
where we will change the name of the new table from **Sales 2024 (2)** to **Sales 2024 report (1)**. Next, select **Close & Load To...** from the toolbar.





1. Select the **Table** radio button;

2. Choose **Existing worksheet**;
3. Navigate to the **Sales Data** sheet and click on cell A1 or enter the cell reference as shown in the screenshot;
4. Ensure the last checkbox is unchecked;
5. Click **OK**.

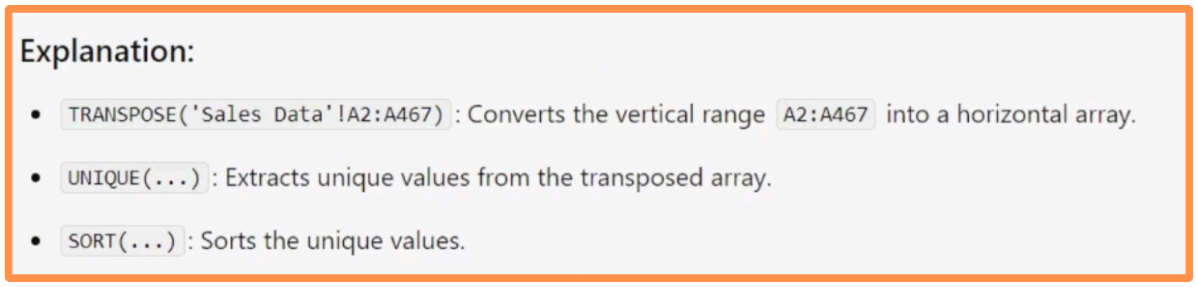


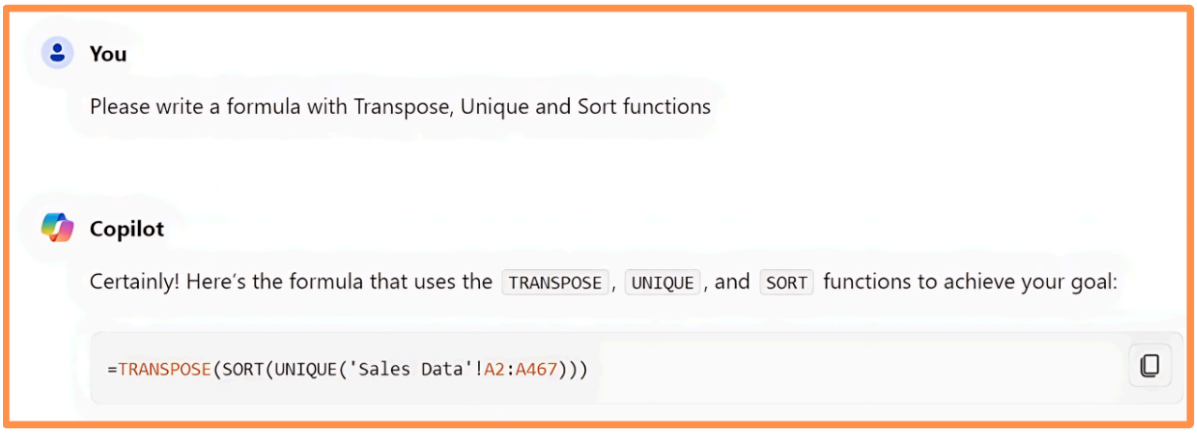
Add Dates

To add the dates in the required format, let's turn to an AI assistant. You can try any, and I will use ChatGPT.

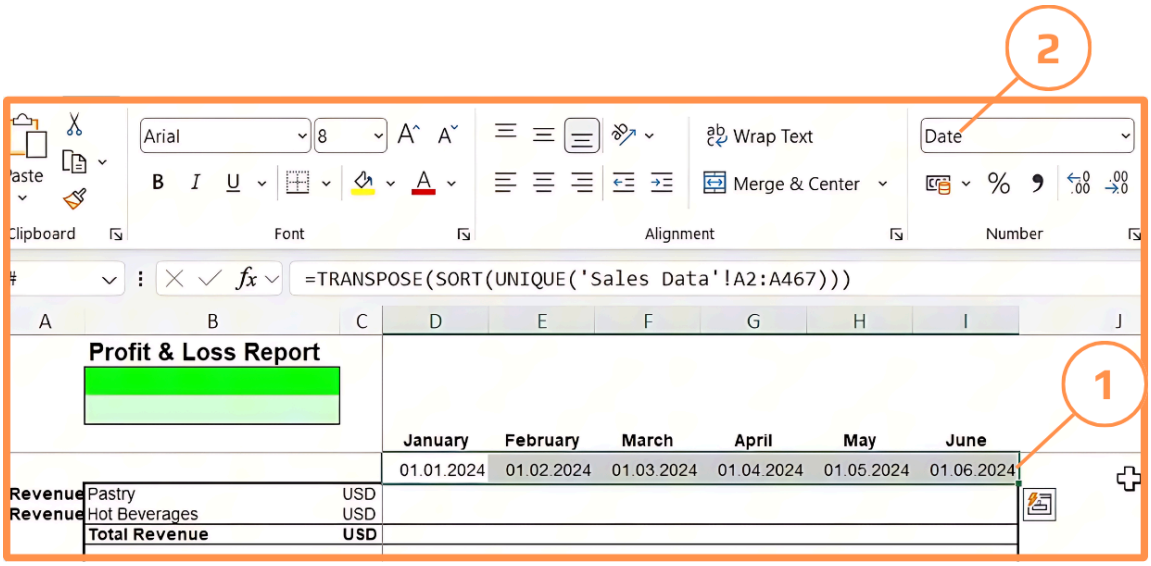
First query:
"How can I create a formula in Excel that transposes a vertical range into a horizontal one, sorts it, and returns unique values from the dynamic range A2:A467 on the 'Sales Data' sheet? Separator ;"

I received the following answer, or rather a part of it that works for me. In the next screenshot, I clarified the request for the formula that needs to be copied and pasted into the table.





Copy the formula and paste it into the 5th line of the report **(1)**. And change the cell format on the **Short Date (2)**.



Add Column

Let's add another column to the table on the **Address Table** sheet, where we will "merge" the data for a more representative and readable display of bakery names. Let's return to our AI assistant and ask:

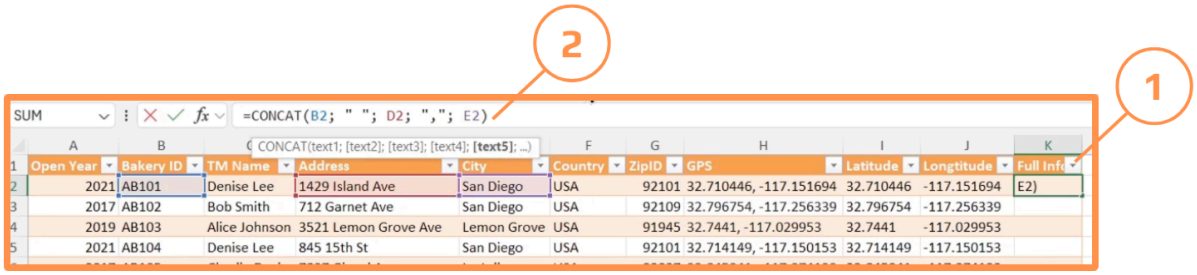
"Please write a formula to combine information from two columns into a single column."

I received a response, and I liked the idea of using the CONCAT function. So, on the **Address Table** sheet, click on the adjacent empty column (cell K1) and enter a column name **(1)**, for example, **Full Info**. We can see that the column adopted the color of the structured table, meaning it automatically joined the table's range. In the next cell after the title (K2), we will begin entering the formula **(2)**:

```
=CONCAT(B2; " "; D2; ", "; E2)
```

Press **OK**, and the column will auto-fill.

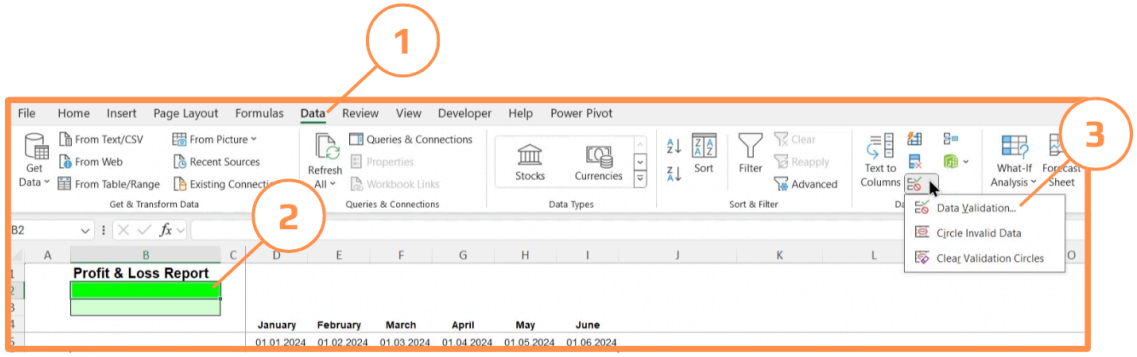
> Note
>
> On different devices, the parameter separator in formulas might vary, for example, a comma (,) instead of a semicolon (;), as in the example.



Dropdown List Set Up

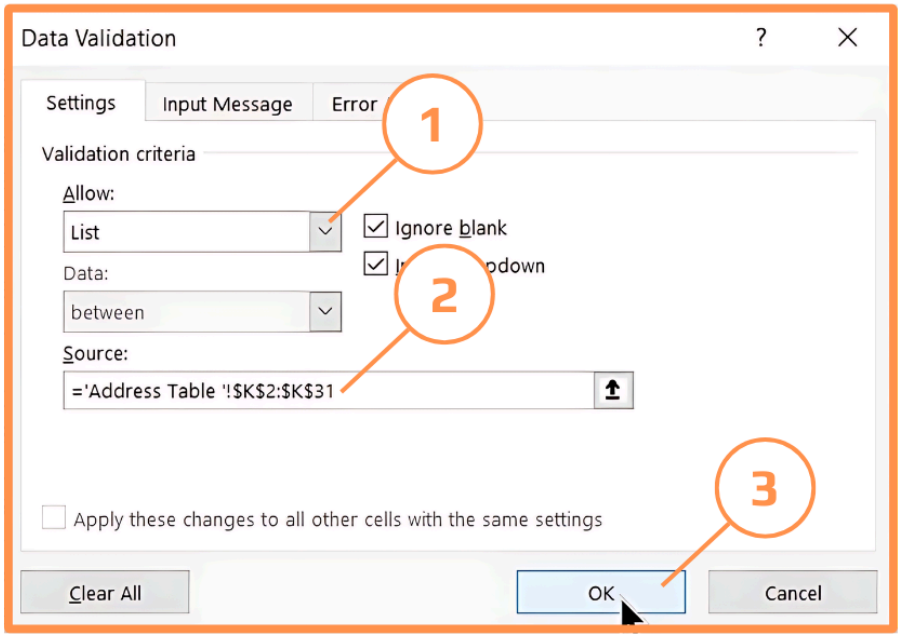
To add a dropdown list to a cell:

1. Go to the **Data** tab in the toolbar;
2. Select the desired cell (B2);
3. Click on **Data Validation...** in the toolbar.



In the new window:

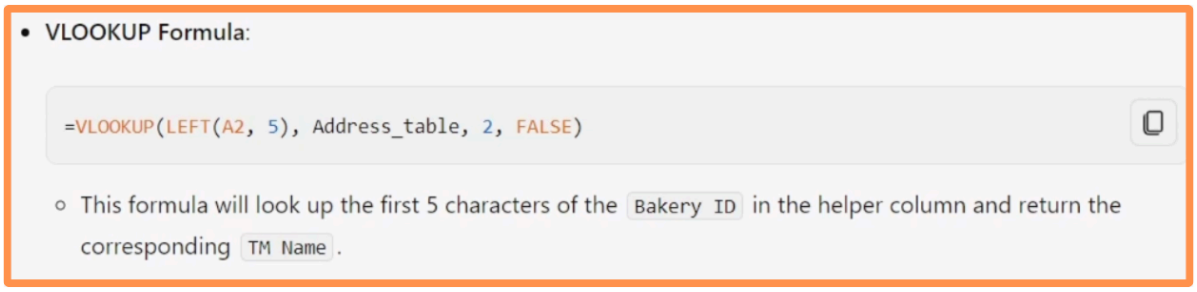
1. Select **List** from the dropdown in the **Allow** field;
2. In the **Source** field, specify the column or range (='Address Table '!$K$2:$K$31);
3. Click **OK**.



Pull Up Manager's Data

In the previous step, we added a dropdown list. In this step, we will add information about the manager to the next cell. Let's return to the AI assistant and ask:
"How to retrieve a value from the TM Name column of the Address_table that corresponds to the Full Info value from the dropdown list but use only the first 5 characters to match with Bakery ID in Excel?"

The assistant suggests using the **VLOOKUP** function. This sounds interesting, so let's give it a try.



On the **Report** sheet, in the light green cell below the dropdown list, select cell **B3**. Let's start entering the formula:

```
=VLOOKUP(LEFT(B2; 5); 'Address Table '!B2:C32; 2; FALSE)
```

Check if everything works. You can manually select the necessary parameters, such as the range in the second parameter.

Now, with each change of the bakery, we will retrieve the corresponding manager.

We have already applied 4 advanced Excel functions.

Save Your Progress

To save your progress, just close the Power Pivot window and save the workbook.