



Excel Shortcuts

Quick Reference – The Most Important Keyboard Shortcuts for Finance (IB, PE, HF/AM, ER, CF, etc.)

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The Fundamentals

Ctrl + O	Open File
Ctrl + N	New File
Ctrl + P	Print
Ctrl + S	Save File
F12	Save File As
Ctrl + F4	Close File
Alt + F4	Close Excel
Esc	Exit Dialog
Ctrl + C	Copy
Ctrl + X	Cut
Ctrl + V	Paste
Ctrl + Z	Undo
Ctrl + Y	Redo
Ctrl + A	Select All
Ctrl + F	Find
Ctrl + H	Replace
Alt + Tab	Switch Windows
Alt, T, O	Options Menu
F4	Repeat Last Action
Ctrl + F1	Show / Hide Ribbon Menu

Navigation & Data Selection

Arrow Keys	Move Around
Ctrl + Arrows	Jump to Boundary
Shift + Arrows	Select Cells
Shift + Ctrl + Arrows	Select to Boundary
Shift + F8	Select Multiple Areas

Editing Cells

F2	Edit Cell
Del	Delete Cell Contents
Ctrl + Arrows	Skip Word(s)
Ctrl + Shift + Arrows	Highlight Word(s)
Alt + Enter	New Line in Cell
Ctrl + Enter / Tab / Shift + Tab	Edit and... Stay in Place / Go Left / Go Right

Rows & Columns

Ctrl + Spacebar	Select Column
Shift + Spacebar	Select Row
Ctrl + Shift + +	Insert Cells / Rows / Columns
Ctrl + -	Delete Cells / Rows / Columns
Right Mouse Button, E	Insert Cut Cells and Shift Over
Alt, A, G, G	Group Rows / Columns
Shift + Alt + Right	Group Rows / Columns
Alt, A, U, U	Ungroup Rows / Columns
Shift + Alt + Left	Ungroup Rows / Columns
Alt, A, J	Show Grouped Rows / Columns
Alt, A, H	Hide Grouped Rows / Columns

Workbooks & Worksheets

Ctrl + N	New Workbook
Ctrl + Tab	Switch Workbook
Shift + F11	New Worksheet
Alt, H, D, S	Del Worksheet
Ctrl + PgUp	Move to Left Worksheet
Ctrl + PgDn	Move to Right Worksheet
Alt, H, O, M	Move / Copy Worksheet
Shift + Ctrl + PgUp / PgDn	Select Multiple Worksheets
Alt, H, O, U, S	Hide Worksheet
Alt, H, O, U, H	Show Worksheet
Alt, H, O, R	Rename Worksheet
Alt, H, O, T	Color Tab

Basic Formatting

Alt, H	Format Menu
Ctrl + 1	Format Dialog
Ctrl + Alt + V	Paste Special
Ctrl + Alt + V, T	Paste Formats
Ctrl + Alt + V, V	Paste Values
Ctrl + Alt + V, F	Paste Formulas
Alt, H, FC	Font Color
Alt, H, H	Fill Color
Alt, H, B	Border Options
Alt, H, A, L/C/ R	Align Left / Center/ Right
Alt, H, 6	Increase Indent
Alt, H, 5	Decrease Indent
Alt, H, 0	Increase Decimal Places
Alt, H, 9	Decrease Decimal Places
Ctrl + B	Bold
Ctrl + I	Italics
Ctrl + U	Underline
Ctrl + 5	Strikethrough
Ctrl + Shift + &	Add Borders
Ctrl + Shift + -	Delete Borders
Shift + Ctrl + ~	General
Shift + Ctrl + !	Number
Shift + Ctrl + @	Time
Shift + Ctrl + #	Date
Shift + Ctrl + \$	Currency
Shift + Ctrl + %	Percentage
Shift + Ctrl + ^	Scientific
=TEXT(Cell, Format)	Displays cell using custom format
Alt, H, O, I	Auto-Fit Col.
Alt, H, O, A	Auto-Fit Row
Alt, H, O, W	Column Width
Alt, H, O, H	Row Height
Alt, H, L, R	Conditional Formatting
Alt, H, T	Format as Table



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Dates & Times

=DATE (Year, Month, Day)	Creates new Date
=NETWORKDAYS (Start, End Date)	Business days in between 2 dates
=EOMONTH (Start Date, # Months)	Last day of month after # months
Ctrl + Shift + ;	Current Time
Ctrl + ;	Current Date

Text Tools & Functions

Alt, A, FT	Text File Import
=LEFT	Chars from left
=RIGHT	Chars from right
=MID	Chars from...
=FIND	Search for text within text
=SEARCH	Same, but not case sensitive
=LEN	Length of text
=SUBSTITUTE	Replace text in text with search
=REPLACE	Same, but use position instead
Alt, A, E	Text to Columns
=TRIM	Deletes Extra Spaces
=PROPER	Capitalize All First Letters
=UPPER	Make All Caps
=LOWER	Make All Lower

Display & Printing

Alt, W, F, F	Freeze Panes
Alt, W, Q	Zoom
Ctrl + Mouse Scroll Wheel	Zoom
Alt, P, S, P	Page Setup
Alt, P, R, S	Set Print Range to Selected Area
Ctrl + F2	Print Preview
Alt, W, I	Page Break View
Alt, W, L	Normal View
Alt, W, VG	Toggle Gridlines

Formulas and Calculations

=	Enter Formula
F9	Refresh All
F4	Anchor Cell
Ctrl + F3	Name Cell
F5	Jump to Cell
Tab	Use Suggested Name
Shift + F3	Enter Built-In Function
Ctrl + Alt + V, F	Paste Formulas
Ctrl + Alt + V, R	Paste Formats & Formulas
Ctrl + D	Copy Down
Ctrl + R	Copy Right
Ctrl + ' (apostrophe)	Copy from Above
F5, Alt + S, F, X	Go to Formulas
F5, Alt + S, O, X	Go to Constants
Ctrl + ~	Show Formulas
=IFERROR(Value, Value If Error)	Calculates only if no error

Lookups & Related Functions

=VLOOKUP (Value, Table, Column #)	Match Value in Left Column and Return from Column #
=HLOOKUP (Value, Table, Row #)	Match Value in Top Row and Return from Row #
=MATCH (Value, Row or Column Range)	Find Item's Position in Row/Column
=INDEX (Table, Row #, Col #)	Return Item at Row # and Column #
=INDIRECT (Ref)	Returns cell at reference given by text
=ADDRESS (Row #, Col #)	Creates cell reference

Common Built-In Functions

=SUM	Sum Numbers
Alt + =	Sum Adjacent Cells
=COUNT	Count # Entries
=AVERAGE	Average
=MAX	Maximum
=MIN	Minimum
=SUMIF / =SUMIFS	Conditional Sum
=COUNTIF / =COUNTIFS	Conditional Count
=SUMPRODUCT	Multiply and Sum Range
=ABS	Absolute Value
=IF	Conditional
=OR	One Must Be True
=AND	All Must Be True
=NPV (Discount Rate, Cash Flows)	Present Value of Cash Flows
=XNPV (Rate, Values, Dates)	PV with irregular dates
=IRR (Values)	Internal Rate of Return of Investment
=XIRR (Values, Dates)	IRR with irregular dates

Database and Array Functions

=DSUM (DB, Field, Criteria)	Sums records that match criteria
=DCOUNT (DB, Field, Criteria)	Counts records that match criteria
Ctrl + Shift + Enter	Enter Array Function
=TRANSPOSE (Rows or Columns)	Converts rows to columns and vice versa



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Auditing Formulas

Ctrl + [Immediate
	Precedents
Ctrl +]	Immediate
	Dependents
Alt, M, P	Trace
	Precedents
Alt, M, D	Trace
	Dependents
Alt, M, A, A	Erase Traces
Shift + Ctrl + {	All Precedents
Shift + Ctrl + }	All Dependents
F5 + Enter	Jump to
	Original Cell
Shift + F2	Add/Edit
	Comment
Alt, R, D	Del Comment
Alt, R, A	Show All
	Comments
F5, Alt, S, C	Highlight Cells
	w/ Comments

Pivot Tables

Alt, N, V Pivot Table

PivotTable Fields

Choose fields to add to report:

- Name
- Company Name
- Telephone
- Address
- City
- State
- ZIP
- Region
- Order Dollar Amount
- Order Date
- Order Time
- Sales Rep ID

MORE TABLES...
Drag fields between areas below:

FILTERS

ROWS

COLUMNS

VALUES

Cut Data By...

Calculate...

Filtering, Sorting & Validating

Alt, A, SS	Sort Data
Alt, A, SA	Sort Ascending
Alt, A, SD	Sort
	Descending
Ctrl + Shift + L	Filter Data
Alt, A, Q	Advanced Data
	Filter
Right Mouse	Filter by Cell's
Button, E, V	Properties
Alt, A, M	Remove
	Duplicates
Alt, A, V, V	Validate Data

Data Validation

Settings | Input Message | Error Alert

Validation criteria

Allow: List

Data: between

Source: =SE\$13:SE\$15

Ignore blank

In-cell dropdown

Apply these changes to all other cells with the same settings

Clear All OK Cancel

Scenarios & Sensitivities

=CHOOSE	Select from List
(Number, Item1,	based on
Item2...)	Number
=OFFSET(Cell, #	Move # of Rows
Rows, # Cols)	and Columns
	from Cell
Alt, A, W, S	Scenario
	Manager
Alt, A, W, G	Goal Seek
Alt, A, W, T	Data Table

Wal-Mart Stores, Inc. - Net Present Value Sensitivity - Terminal Growth Rates

		4.5%	5.0%	5.5%	6.0%	6.5%
Terminal Growth Rate	2.8%	125.00 \$	108.51 \$	95.90 \$	85.95 \$	77.89 \$
	2.3%					
	1.8%					
	1.3%					
	0.8%					
	0.3%					

Data Table

Row input cell:

Column input cell:

OK Cancel

- **Row Input Cell** = Discount Rate
- **Column Input Cell** = Terminal Growth Rate

Macros, VBA, and Forms

Alt, F11	VBA Editor
F5 (in VBA)	Run Macro
F2 (in VBA)	Object Browser
Ctrl + G (in VBA)	Immediate
	Window
Alt, L, I	Form Control
Alt, W, M, U	Use Relative
	References
Alt, W, M, R	Record Macro
Alt, W, M, V	View Macros

Record Macro

Macro name: Color_Code

Shortcut key: Ctrl+Shift+ C

Store macro in: This Workbook

Description: Color codes cells black, blue, and green.

OK Cancel

Graphs & Charts

Alt, N, C	Column Chart
Alt, N, N	Line Chart
Alt, N, Q	Pie Chart
Alt, N, B	Bar Chart
Alt, N, X	Text Box
Alt, N, SD	Combo Chart
	(2013+)
Alt, N, R	Recommended
	Chart (2013+)
Alt, JC, A	Add Chart
	Element (2013+)
Alt, JC	Design Tab
Alt, JA	Layout Tab
	(2007, 2010)
Alt, JO	Format Tab
	(2007, 2010)
Alt, JA	Format Tab
	(2013)

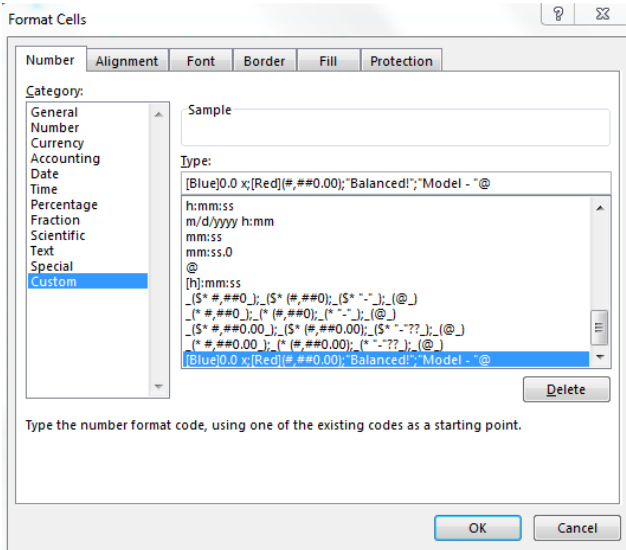


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Custom Number Formats



Example Data:	Displayed As:	Used For:
5	5.0x	Valuation Multiples
-1200	(1,200.00)	Negative Expenses
0	Balanced!	Balance Sheet Checks
Wal-Mart	Model – Wal-Mart	Titles & Headers

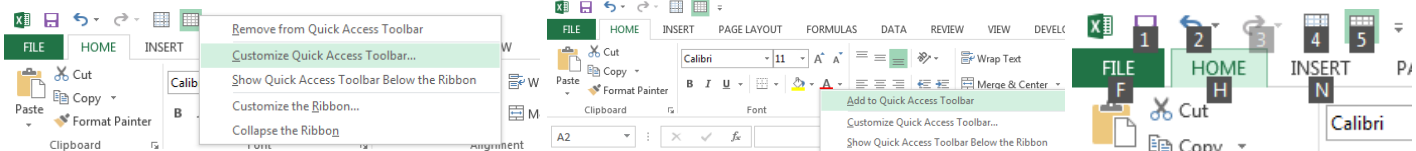
Text on Left: [Blue]0.0 x;[Red](#,##0.00);"Balanced!";"Model - "@

1. The order for Custom Number Formats is: **[Positive Style]; [Negative Style]; [Zero Style]; [Text Style]**
2. If you include the “@” symbol and text, the text will appear and the “@” will be replaced by what’s in the cell.
3. **[Red]** and **[Blue]** can be used for color coding.
4. For more on custom number formats, please see our separate guide – this is just a brief summary.

Custom Keyboard Shortcuts

You can add custom shortcuts by right clicking the Quick Access Toolbar and going to “Customize Quick Access Toolbar,” or you can right-click the button itself and go to “Add to Quick Access Toolbar.”

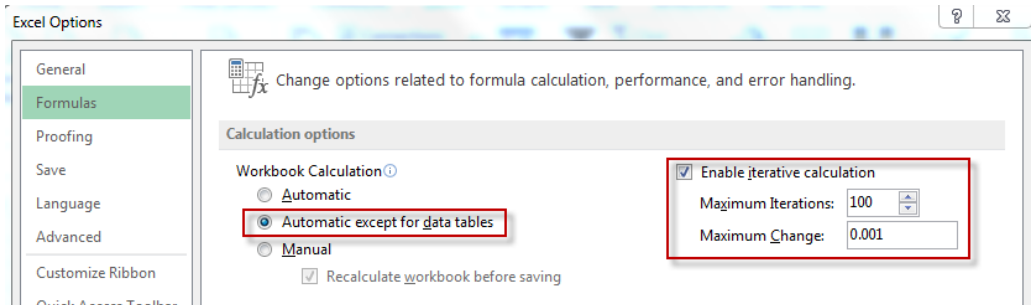
Then, you activate the shortcut by pressing the Alt key followed by its assigned number. Alt, 4 would change the spreadsheet to a “Page Break” view here.



Always make sure you go to the Options menu (Alt, T, O), select Formulas, and use the settings shown on the right:

Ideally, you will also disable the language bar and any plug-ins, add-ins, or macros that interfere with shortcuts, and any programs that override built-in Excel shortcuts.

The Optimal Excel Settings – IMPORTANT!



You can disable automatic error-checking if you want, but we recommend leaving it on; if you go the “Advanced” tab you can change the direction the cursor moves after editing a cell, but we usually leave that alone.