
TRAINER'S GUIDE · FACILITATOR HANDBOOK

Excel for Sales

From a raw Dubai sales export to answers for the VP — the whole workflow.

Prepared by Oleks Tverdokhlieb

Course repo github.com/scripts-and-tables/Excel-101

Live course <https://scripts-and-tables.github.io/Excel-101/>

Format Intermediate · ≈ 5 hours · instructor-led, practice-heavy

Version 1.0 · 07 June 2026

100% synthetic data. A UAE FMCG setting (fictional Food & HPC brands sold to Dubai supermarkets). Customers are real chain names used only as labels; everything else is generated. Nothing real or confidential — and the brands are unrelated to any Transmed portfolio.

About this guide

This handbook is for **trainers delivering the course** — the run-sheet, talking points, pitfalls, and the capstone answer key. Learner-facing lessons, downloadable workbooks and quizzes live on the course site; this is the back-of-house companion.

Audience & scope

Intermediate sales people (account managers, reps, sales ops) who **receive** sales exports and must analyse them. We teach the ~80% they use daily and deliberately exclude analyst tooling (dynamic arrays, Power Query, Power Pivot, macros). VLOOKUP is taught as primary; XLOOKUP is a note. Works in Excel 2016+.

Timed agenda

Intro & setup	10 min
M1 · Receive & clean	50 min
M2 · Structure & enrich	45 min
 Break	10 min
M3 · Explore & summarize	60 min
M4 · Pivot & rank	40 min
 Break	10 min
M5 · Present	50 min
 Capstone	40 min
Wrap-up & Q&A	10 min

Two short breaks; capstone is the assessment. Stretches to ~5 hrs with fuller Q&A.

Learning outcomes

- Clean a raw export into a trustworthy Table (TRIM/CLEAN, VALUE/DATEVALUE, text functions, dedupe).
- Enrich with VLOOKUP — rep→manager/quota and brand→brand manager — and dodge its six failures.
- Summarise with SUMIFS/COUNTIFS/AVERAGEIFS; compute net sales, return rate, AOV, quota attainment.
- Reshape and rank with PivotTables, slicers, leaderboards.
- Present a one-pager; run the whole workflow in a capstone.

The dataset

One synthetic export flows through every module. Two reference tables drive the lookups.

SALES_DATA.CSV — ORDER LINES

OrderNumber · Date · InvoiceType (Sales/Return) · CustomerCode · Customer · BranchCode · Branch · Area · SalesRep · Brand · Category · SalesQuantity · SalesValue.

Returns carry negative quantity & value.

REPS.CSV

SalesRep · Manager · AnnualQuota

BRANDS.CSV

Brand · Category · BrandManager

AT A GLANCE (COMPUTED)

Order lines	2,000
Period	2024-01-01 → 2025-12-31
Customers · branches · areas	15 · 69 · 18
Reps · brands · brand managers	15 · 20 · 5
Net sales	AED 21,851,229
Return rate	6.5%
Average sale value	AED 12,494

Example entities used in exercises: rep **Mohammed Saleh**, brand manager **Imran Sheikh**, area **Deira**, category **Food**, brand **Crunchio**, customer **Carrefour**.

Module-by-module facilitator notes

M1 Receive & clean

50 min

Objective. Turn a raw supermarket sales export into a clean, trustworthy Excel Table.

Files: [module-1.xlsx](#)

TEACH

- Make it a Table (**Ctrl+T**), name it `Sales` — structured references, auto-expand, filters.
- **TRIM** stray spaces, **CLEAN** hidden line-breaks/tabs in Customer names.
- **Find & Replace** (Ctrl+H) to fix CAPS areas in bulk (DEIRA → Deira).
- **VALUE** for numbers stored as text, **DATEVALUE** for text dates (left-aligned = text).
- Split/combine codes: **LEFT / MID / RIGHT**, **SUBSTITUTE**, **&** to join.
- **Paste Special** → **Values** to lock helper results; Remove Duplicates; sort; freeze header.
- Number formats: AED currency & the `"AED"` `#,##0` custom format.

WATCH FOR

- Returns carry **negative** quantity & value — point this out early; it underpins every KPI later.
- The most common 'my SUM is wrong' is text-stored numbers — show the left-align tell.
- Data > Remove Duplicates keeps the first occurrence; untick OrderNumber when deduping.

EXERCISES

RawData (messy) + a Cleanup Practice sheet (one cell per function) + 10 exercises. Solution = clean Sales Table.

M2 Structure & enrich

Excel for Sales · Trainer's Guide · Oleks Tverdokhlieb

45 min
github.com/scripts-and-tables/Excel-101

Objective. Add the context the export lacks — sales manager & quota (Reps) and brand manager (Brands) — with VLOOKUP.

Files: [module-2.xlsx](#)

TEACH

- **VLOOKUP** anatomy: `=VLOOKUP([@SalesRep], Reps, 2, FALSE)` → Manager; 3 → Quota.
- Second lookup: `=VLOOKUP([@Brand], Brands, 3, FALSE)` → BrandManager.
- Always **FALSE** (exact). Demonstrate how TRUE silently returns the wrong row.
- The **six failure modes** (forgot FALSE, can't look left, column-index shift, text-vs-number, spaces, genuine #N/A).
- **IFERROR** to turn #N/A into "unknown". XLOOKUP shown as the modern note only.

WATCH FOR

- Learners conflate lookup value vs first column — stress VLOOKUP matches the table's *first* column.
- If a lookup #N/As on identical-looking text, it's almost always spaces or text-vs-number (ties back to Stage 1).
- Keep XLOOKUP brief — many learners are on Excel 2016/2019 where it doesn't exist.

EXERCISES

Sales + Reps + Brands sheets, 7 exercises. Solution = enriched Sales (SalesManager/BrandManager/Quota) + a Failure Modes sheet.

M3 Explore & summarize

60 min

Objective. Answer everyday questions: filter first, then the conditional trio and the sales KPIs.

Files: [module-3.xlsx](#)

TEACH

- Explore with **AutoFilter** (Ctrl+Shift+L) and the **Status Bar** (sum/count/avg, no formula).
- **SUBTOTAL(9/103/101, ...)** totals only visible rows; Data > Subtotal for group totals (range only).
- The trio: **SUMIFS / COUNTIFS / AVERAGEIFS** — sum_range first, then criteria pairs.
- Net sales = `SUM(SalesValue)` (returns net out automatically); gross = SUMIFS on InvoiceType=Sales.
- KPIs: **return rate**, **average sale**, **sales by brand manager** (enriched column), **quota attainment** (SUMIFS ÷ VLOOKUP).
- Mechanics: double-click fill handle; F4 absolute/relative.

WATCH FOR

- Return rate: returns are negative, so negate before dividing — `=-SUMIFS(...Return)/SUMIFS(...Sales)`.
- Data > Subtotal is greyed out on a Table — convert to range first (common 'why can't I' moment).
- Encourage criteria-in-cells so a formula becomes a reusable mini-report.

EXERCISES

Enriched Sales + Reps + Brands, 11 prompts (SUM/AVERAGE/COUNT, IF, the trio, KPIs, commission-free quota).

M4 Pivot & rank

Excel for Sales · Trainer's Guide · Oleks Tverdokhlieb

40 min
github.com/scripts-and-tables/Excel-101

Objective. Reshape the whole dataset in seconds and produce the leaderboards.

Files: [module-4.xlsx](#)

TEACH

- Build a pivot; the four drop zones; switch Sum → Count/Average via Value Field Settings.
- Group **Date** by Quarter/Year; **Show Values As** → **% of Grand Total**.
- **Slicers** for Area/InvoiceType; **Report Connections** to drive several pivots (mini-dashboard).
- Leaderboards: **Top-5 reps** by net sales (Value Filter → Top 10 → 5) and **net sales by Brand Manager**.
- Refresh: pivots cache — right-click → Refresh / Data > Refresh All.

WATCH FOR

- Date grouping needs real dates — if grouping fails, a date column is still text (back to Stage 1).
- openpyxl can't author pivots, so the solution mirrors them with SUMIFS + data bars — tell learners that.

EXERCISES

Enriched Sales + scratchpad (4 pivots + 2 leaderboards). Solution = SUMIFS mirror with a data-bar leaderboard.

M5 Present & capstone

70 min

Objective. Turn the analysis into a one-page summary, then have learners run the whole workflow on a fresh file.

Files: [module-5.xlsx](#) + [capstone.xlsx](#)

TEACH

- KPI strip (net sales, gross, return rate, avg sale, # invoices) — most important number top-left.
- One clean column chart (sorted, titled, AED axis); a Category × Area heat map (color scale).
- Conditional formatting: data bars, icon sets, duplicate values, and a formula rule to flag Return rows red.
- Hand out the capstone: a fresh file + the 11 questions; let them work, then walk the answer key.

WATCH FOR

- Keep presentation ruthless — one screen, one colour per area, AED 1.2M not 1234567.89.
- In the capstone, push live formulas over typed numbers so answers survive a data refresh.

EXERCISES

One-Pager build + capstone.xlsx (Questions / Answers). Answer key with expected values is in this guide.

Capstone — answer key

Excel for Sales - Trainer's Guide - Oleks Tverdokhlieb

github.com/scripts-and-tables/Excel-101

Brief. "You're the new analyst on the Dubai account. Before Monday's meeting, answer the VP's questions, then drop the headline numbers into a one-page summary." Learners use PivotTables, AutoFilter, SUMIFS/COUNTIFS and VLOOKUP. Expected values below (your learners' numbers should match — the data is deterministic).

#	QUESTION	EXPECTED ANSWER
1	Net sales (sum of SalesValue)	AED 21,851,229
2	Gross sales (Sales invoices only)	AED 23,363,782
3	Total returns value	AED -1,512,553
4	Return rate (returns ÷ gross)	6.5%
5	Number of invoice lines	2,000
6	Average sale value (Sales lines only)	AED 12,494
7	Net sales in the Deira area	AED 2,659,622
8	Net sales for the Food category	AED 8,407,356
9	Net sales for customer Carrefour	AED 1,409,320
10	Net sales for brand manager Imran Sheikh	AED 3,193,285
11	Mohammed Saleh — quota attainment	120.8%

Each answer also has a live-formula route in [capstone.xlsx](#) (Answers sheet) — prefer formulas over typed numbers so they survive a refresh.

Delivery tips

- **Demo, then they do.** Each module: show the move once on the shared screen, then give them the exercise sheet and circulate.
- **One running file.** Reinforce that it's the same dataset travelling the workflow — that's the spine that makes it stick.
- **Returns are negative** is the single most important concept for the KPIs — anchor it in M1 and keep referring back.
- **Virtual delivery:** share the working file in advance; use breakout time for exercises; reconvene to compare with the solution file.
- **Pacing:** M3 is the longest and highest-value — protect its time; M4/M5 can compress if you're behind.
- **Quizzes** (6 per module, in-browser, 70% to pass) are optional self-checks; the **capstone is the real assessment**.

Appendix A · Keyboard shortcuts

Ctrl + T	Create a Table
Ctrl + Shift + L	Toggle AutoFilter
Ctrl + Alt + V	Paste Special
Ctrl + H / Ctrl + F	Replace / Find
Ctrl + D	Fill down
Ctrl + Shift + ↓	Select to bottom of column
Ctrl + 1	Format Cells
Ctrl + Shift + 1	Number format (thousands)
Alt + =	AutoSum
Alt + N + V	Insert PivotTable
F2	Edit active cell
F4	Toggle absolute / relative reference

Appendix B · Official Microsoft documentation

Every function/feature the course covers, linked to Microsoft's own docs.

M1 — CLEANING & TEXT

- Create and format an Excel table
- Top ten ways to clean your data
- TRIM
- CLEAN
- VALUE
- DATEVALUE
- LEFT
- MID
- RIGHT
- SUBSTITUTE
- Combine text (& / CONCAT)
- Find or replace text and numbers
- Find and remove duplicates
- Sort data in a range or table
- Freeze panes
- Move or copy cells (Paste Special)
- Available number formats

M2 — LOOKUPS

- VLOOKUP
- VLOOKUP troubleshooting (failure modes)
- IFERROR
- XLOOKUP
- Look up values with VLOOKUP, INDEX or MATCH
- MATCH

M3 — SUMMARIZING

- SUM
- AVERAGE
- COUNT
- COUNTA

- MAX

Excel For Sales · Trainer's Guide · Oleks Tverdokhlieb

- SUMIFS
- COUNTIFS
- AVERAGEIFS

M4 — PIVOT & RANK

- Create a PivotTable
- Group or ungroup data in a PivotTable
- Show Values As

M5 — PRESENT

- Add, change, or clear conditional formats
- Create a chart from start to finish

- SUBTOTAL

<https://github.com/scripts-and-tables/Excel-101>

- Filter data in a range on table
- Insert subtotals (Data > Subtotal)
- Use AutoSum
- Relative / absolute / mixed references

- Use slicers to filter data
- Refresh PivotTable data

- Available number formats
- Keyboard shortcuts in Excel

Appendix C · Downloads

All files are served from the course site under [/files/](#):

- Working & solution workbooks: [module-1.xlsx](#) ... [module-5.xlsx](#), [capstone.xlsx](#)
- Datasets: [sales_data.csv](#), [reps.csv](#), [brands.csv](#)
- Downloads page: <https://scripts-and-tables.github.io/Excel-101/downloads/>

Credits

Author & facilitator

Oleks Tverdokhlieb

Course repository

<https://github.com/scripts-and-tables/Excel-101>

Live course

<https://scripts-and-tables.github.io/Excel-101/>

Data

100% synthetic, generated from a fixed seed. Customers are real Dubai supermarket chain names used only as labels; brands are fictional and unrelated to any real company.

Licence

Course content MIT licensed. Version 1.0 · 07 June 2026