

# How to use Copilot in Excel

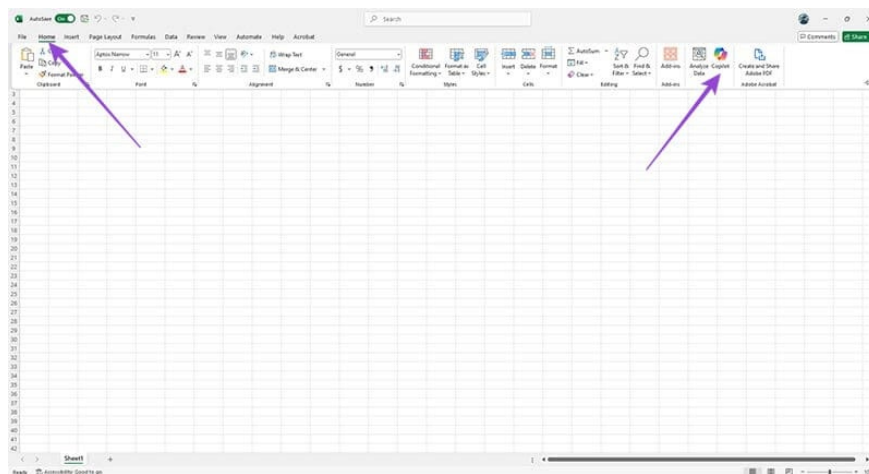
With Copilot, users can easily summarize data, organize spreadsheets, and create formulas within Excel data tables.

Microsoft Copilot is an AI assistant that can be integrated into many MS Office applications, including Excel. With Copilot, users can summarize data, organize spreadsheets, and create formulas within Excel data tables. This provides additional tools for processing data in Excel. Below is a guide on how to use Copilot in Excel.

## How to use Copilot in Excel

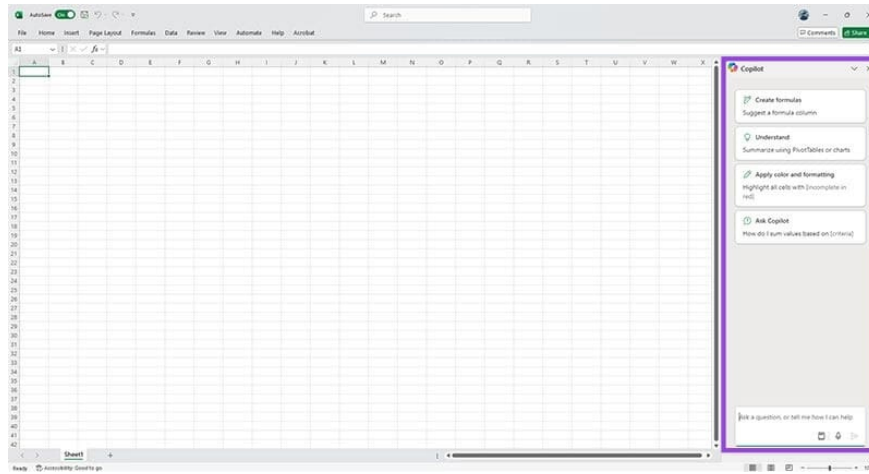
### Step 1:

After adding Copilot to Excel, click **the Copilot icon** in the upper right corner to use it.



### Step 2:

**At this point, a chat window with Copilot** will appear on the right side of the interface for us to use. Here, users can enter their requests for Copilot to process the data table in Excel.



For example, if you want Copilot to filter the 5 lowest revenue values, you enter "Highlight the lowest 5 revenue fields". Copilot will then analyze the data to find the 5 lowest values. As a result, you will see those 5 values ?? highlighted in the table.

Budget	Revenue	Total Users Targeted	Engaged Users
£ 500	£ 6,980	4,205	465
£ 250	£ 4,732	2,000	500
£ 4,500	£ 5,632	10,000	362
£ 2,750	£ 5,676	35,000	5,418
£ 5,800	£ 136	10,000	285
£ 800	£ 8,703	2,500	496
£ 600	£ 4,540	950	618
£ 800	£ 788	2,000	367
£ 500	£ 12,423	4,205	902
£ 500	£ 9,293	3,687	673
£ 500	£ 16,342	5,278	1,029
£ 635	£ 2,208	55,000	1,470

**Copilot (Preview)**

highlight the lowest 5 revenue fields

Done! I made the following changes:

- I applied a #FFC7CE fill color and a #000000 font color to the bottom 5 items in F2:F13.

Undo

AI-generated content may be incorrect

Sort 'Total Users Targeted' from smallest to largest

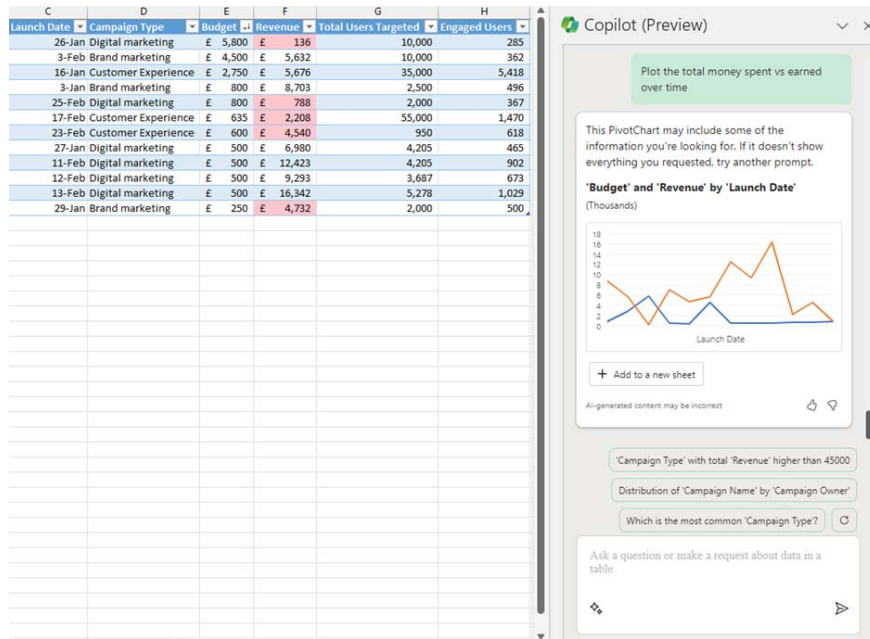
Bold the top 10 values in 'Engaged Users'

Show items with 'Revenue' of '6980'

Ask a question or make a request about data in a table

Copilot's editing function in Excel can also help you sort and filter data. For example, if you want to sort the budget column from largest to smallest, enter "Sort the budget column largest to smallest".

In addition to data processing, Copilot can also create charts based on your requirements. For example, if you want to create a chart comparing total expenses to earnings over time, Copilot will analyze the data, identify the date column, budget column, and revenue column. Then, Copilot will suggest a chart, and you can click "Add to new sheet" to insert the chart into your document .

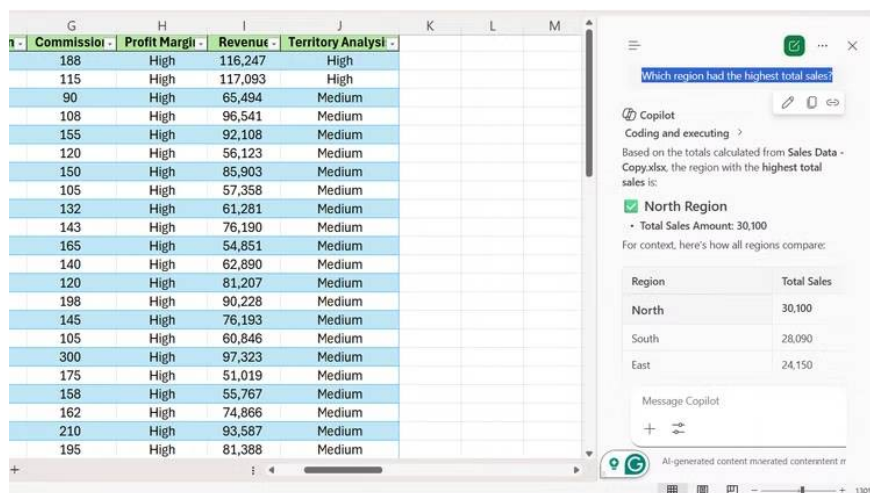


## Why is using Copilot in Excel better than PivotTables?

PivotTables have been Excel's default solution for data analysis for decades, and people have used them enough times to know exactly how they work. They work well, but the setup always feels inadequate for the questions you actually want to ask. Copilot's natural language queries bypass that by allowing you to type a simple question in English into Copilot and get an answer.

It's not a function or a hidden feature; it's simply a dialogue with your data.

**Copilot lets you ask questions instead of having to build spreadsheets.**



	G	H	I	J	K	L	M
	Commission	Profit Margi	Revenue	Territory Analsi			
188	High	116,247	High				
115	High	117,093	High				
90	High	65,494	Medium				
108	High	96,541	Medium				
155	High	92,108	Medium				
120	High	56,123	Medium				
150	High	85,903	Medium				
105	High	57,358	Medium				
132	High	61,281	Medium				
143	High	76,190	Medium				
165	High	54,851	Medium				
140	High	62,890	Medium				
120	High	81,207	Medium				
198	High	90,228	Medium				
145	High	76,193	Medium				
105	High	60,846	Medium				
300	High	97,323	Medium				
175	High	51,019	Medium				
158	High	55,767	Medium				
162	High	74,866	Medium				
210	High	93,587	Medium				
195	High	81,388	Medium				

Show me a breakdown of sales by product category for the North region.

**Copilot**  
Reasoning completed in 3 steps >

Here's the sales breakdown by product category for the <region> </region> North region from Sales Data - Copy.xlsx.

Product Category	Units Sold
Electronics	39
Clothing	73
Sports	60
Home & Garden	39

Message Copilot

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Product Category	Units Sold
Electronics	39
Clothing	73
Sports	60
Home & Garden	39

+ Add to new sheet

Quick read: In <region> </region> North <product category=""> </product> Electronics </Product Category> leads total

Message Copilot

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Which salesperson had the highest total sales amount?

**Copilot**  
Coding and executing >

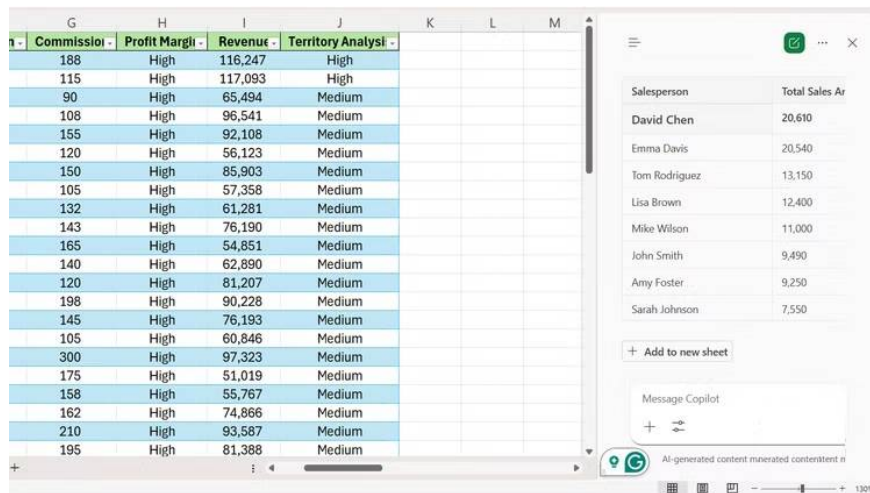
From Sales Data - Copy.xlsx, the salesperson with the highest total sales amount is:

**David Chen**  
• Total Sales Amount: 20,610

Here's the full ranking for transparency:

Salesperson	Total Sales Ar
David Chen	20,610
Emma Davis	20,540
Tom Rodriguez	13,150

Message Copilot



The traditional workflow for using PivotTables in sales spreadsheets goes like this: You select the data range, click Insert, choose PivotTable, decide where to place it, then drag the range to the rows, product categories to the columns, and revenue to the values. If you want to calculate the average instead of the sum, you need to right-click and change the aggregation method. That's a lot of clicks just to answer one question.

With Copilot, you just need to type:

Which region had the highest total sales?

*Which region has the highest total revenue?*

That's it. Copilot reads the table—in this example, 32 rows of sales data spread across North, South, East, and West on 4 product categories—and returns a direct answer.

The advantage becomes clear when you need the next answer. With PivotTable, another question often means reconfiguring the layout or building a second table. In Copilot, you simply type the next question. Once you have the lead area, ask:

Show me a breakdown of sales by product category for the North region.

*Please show me the sales breakdown by product category for the Northern region.*

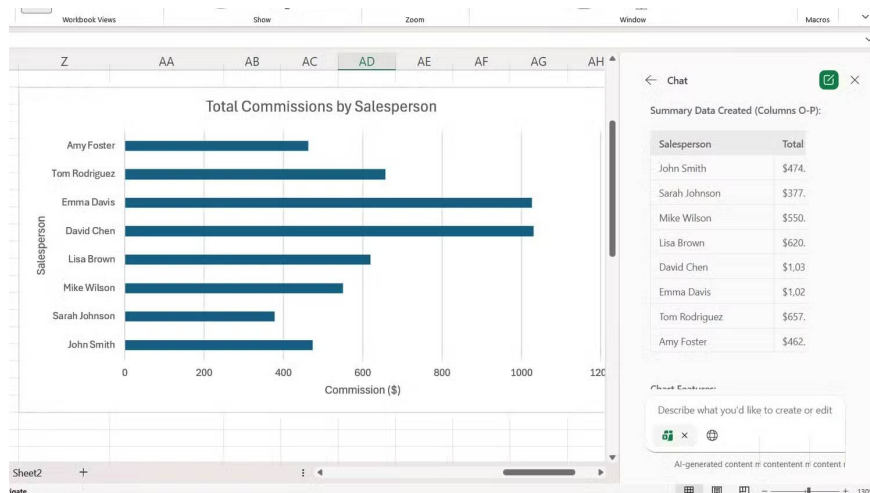
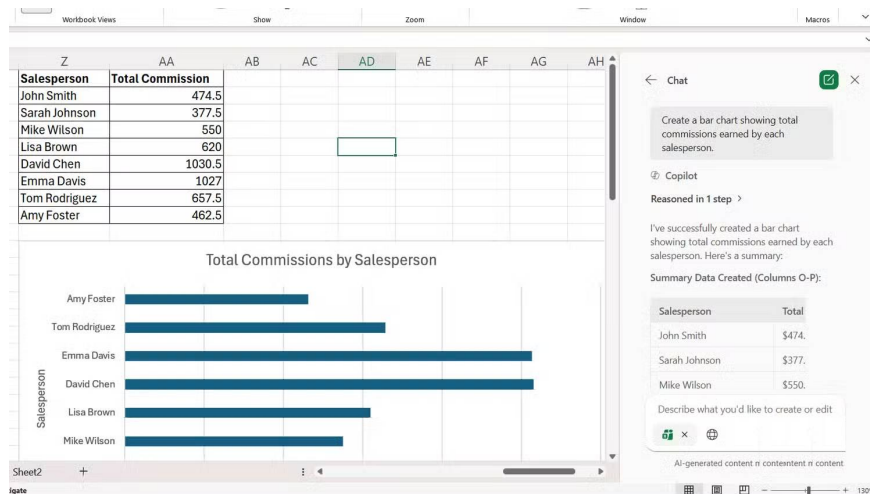
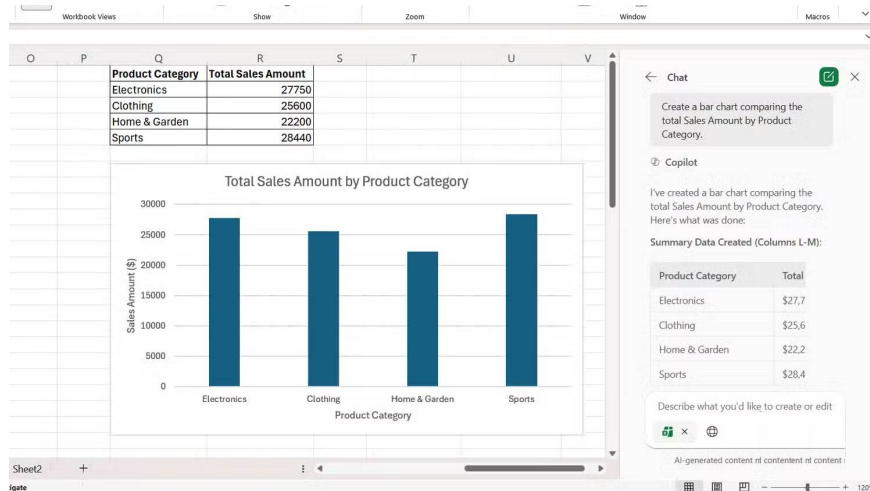
Copilot responded with a clear summary table listing Electronics, Clothing, Home & Garden, and Sports, each with its corresponding total sales figures.

Do the same with individual performance. Typing "Which salesperson had the highest total sales amount?" will give you the ranked answer across all eight salespeople in the spreadsheet, with David Chen and Emma Davis tied for first place and Sarah Johnson at the bottom. That type of query typically requires grouping by Salesperson in a PivotTable and manually sorting the results.

This conversational flow makes it practical to use because you don't need to plan your analysis beforehand or decide which fields to include—you simply ask what you want to know, one question at a time. However, if a question doesn't return exactly what you need, refining it only takes a few seconds.

**It handles charting and summarizing in a single step.**

You don't need to create a separate chart after analyzing the data.



Creating a chart in Excel the conventional way requires selecting a data range, choosing a chart type from the toolbar, and then adjusting axis labels, titles, and colors until the chart conveys your desired message. If you create a PivotTable first, you'll then create a PivotChart on top of it—adding another layer of setup to a simple

visual representation.

Copilot condenses everything into a single command. Enter the following command and it will generate a chart with the Electronics, Clothing, Home & Garden, and Sports categories drawn side-by-side.

Create a bar chart comparing the total Sales Amount by Product Category.

=> *Create a bar chart comparing total revenue by product category.*

The labels are pre-set and there's no need to select a range or edit them in the Charts section of Insert. You can also be more specific. Using the following command, Copilot retrieved commission data for all eight people in the spreadsheet and created a chart without pointing to specific cells. Copilot automatically inferred the relevant columns.

Create a bar chart showing total commissions earned by each salesperson.

=> *Create a bar chart showing the total commission earned by each salesperson.*

This is where significant time savings occur. A single chart isn't a big deal. But if you're creating a quick report and need three or four visual representations from different angles of the same dataset, the traditional method quickly becomes time-consuming. With Copilot, each chart is just another suggestion. Microsoft is also actively developing how Copilot works within Excel, with Agent Mode offering deeper analytical options beyond the basic chat prompts.

## **Copilot isn't perfect, and PivotTables still have their own place.**

Copilot requires a Microsoft 365 Copilot license, and it sometimes struggles when your data has merged cells, empty rows, or inconsistent headers. For live dashboards with filters or calculated fields that you'll review weekly, PivotTables is still a better fit. But for quick questions, such as which item sold best last quarter, who earned the most commission, and how does the East compare to the West, entering a statement is more efficient than configuring a table. Try both on the same dataset and see which one works first.

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