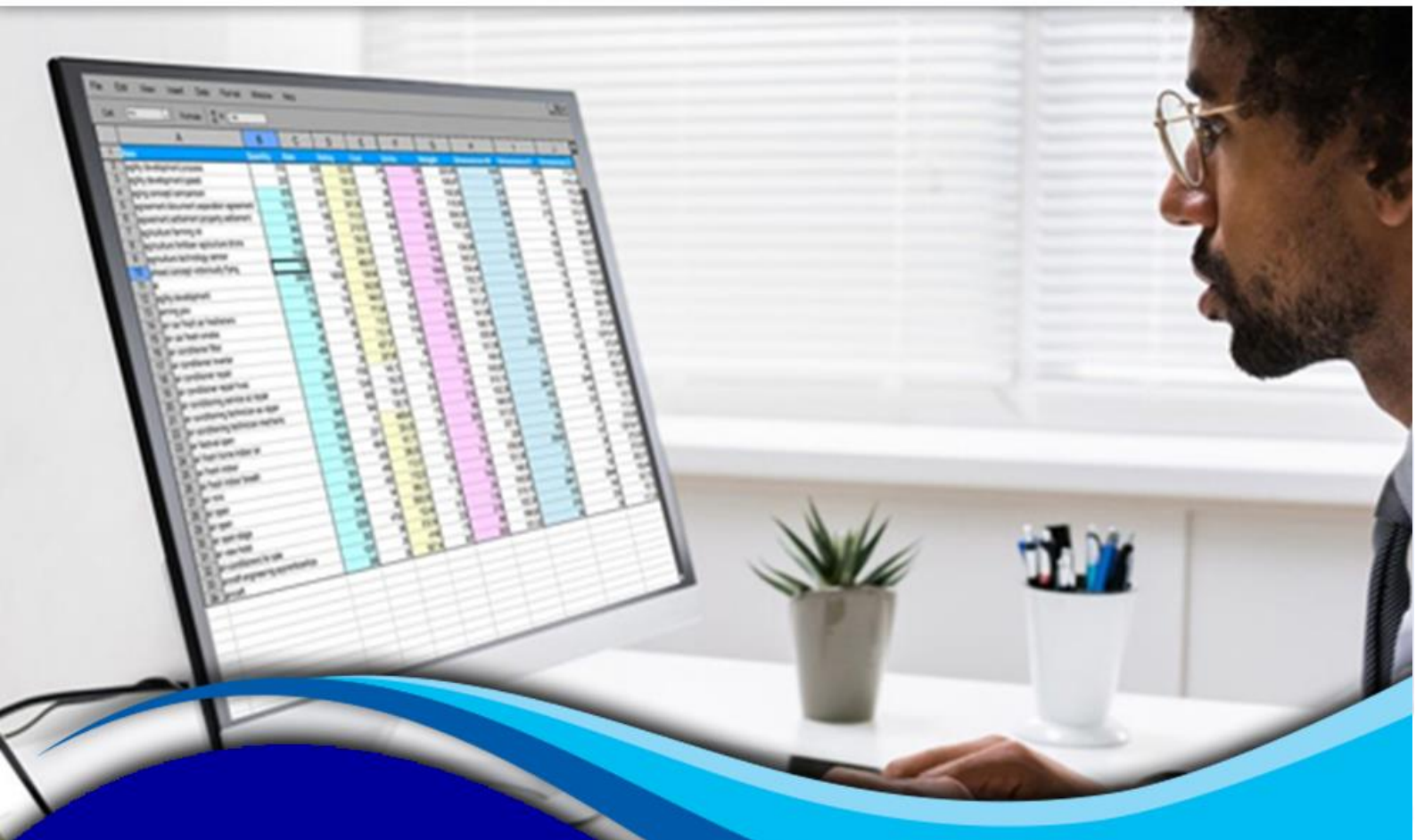




African Helix
Training

In Pursuit of Excellence and Beyond...



Excel Fundamentals - Formulas for Finance

Course Content

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Overview

This intensive 3-day course is designed to introduce finance professionals and non-financial users to the core functions and formulas of Microsoft Excel, with a specific focus on financial applications. Through hands-on exercises, real-world datasets, and financial scenarios, participants will gain practical skills to perform data analysis, automate calculations, and build financial models using Excel's built-in tools.



Course Prerequisites

Basic familiarity with Microsoft Excel (navigation, data entry). No prior advanced Excel or financial modelling knowledge is required.



Target Audience

Junior and mid-level finance professionals. Bookkeepers, accountants, and analysts. Business owners and startup teams. Non-financial managers needing to understand spreadsheet-based finance. Students and graduates entering finance-related roles. Central bank and regulatory staff



Course Outline



Duration

In Class: 3 Days (08:30 – 15:30)



Delivery Methods

- On-Site
- Online
- At designated location



What You Get

- Certificate of Completion



Course Dates

- TBA



Course Location

- Johannesburg, South Africa



Course Fees

R 11 275.00 per Learner

(Excluding VAT)





Day 1: Excel Foundations for Financial Tasks

- Navigating Excel: shortcuts, layout, ribbon, and cells
- Formatting for readability and consistency
- Introduction to cell referencing (relative vs. absolute)
- Basic formulas: SUM, AVERAGE, MIN, MAX, COUNT
- AutoFill and Flash Fill
- Practical Exercise: Build a simple expense tracker

Day 2: Intermediate Formulas and Financial Analysis Tools

- Logical functions: IF, AND, OR, IFERROR
- Lookup functions: VLOOKUP, HLOOKUP, XLOOKUP, INDEX, MATCH
- Using named ranges and data validation
- Introduction to conditional formatting
- Practical Exercise: Create a dynamic monthly budget or income statement

Day 3: Financial Modelling Tools and Visualization

- Basic charting: bar, line, pie, combo charts
- Introduction to pivot tables and pivot charts
- Introduction to goal seek and what-if analysis
- Overview of PMT function and basic loan calculators
- Practical Exercise: Build a personal loan amortization schedule and cash flow forecast



For More Details and to Register, Please Contact

Course Coordinator

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