

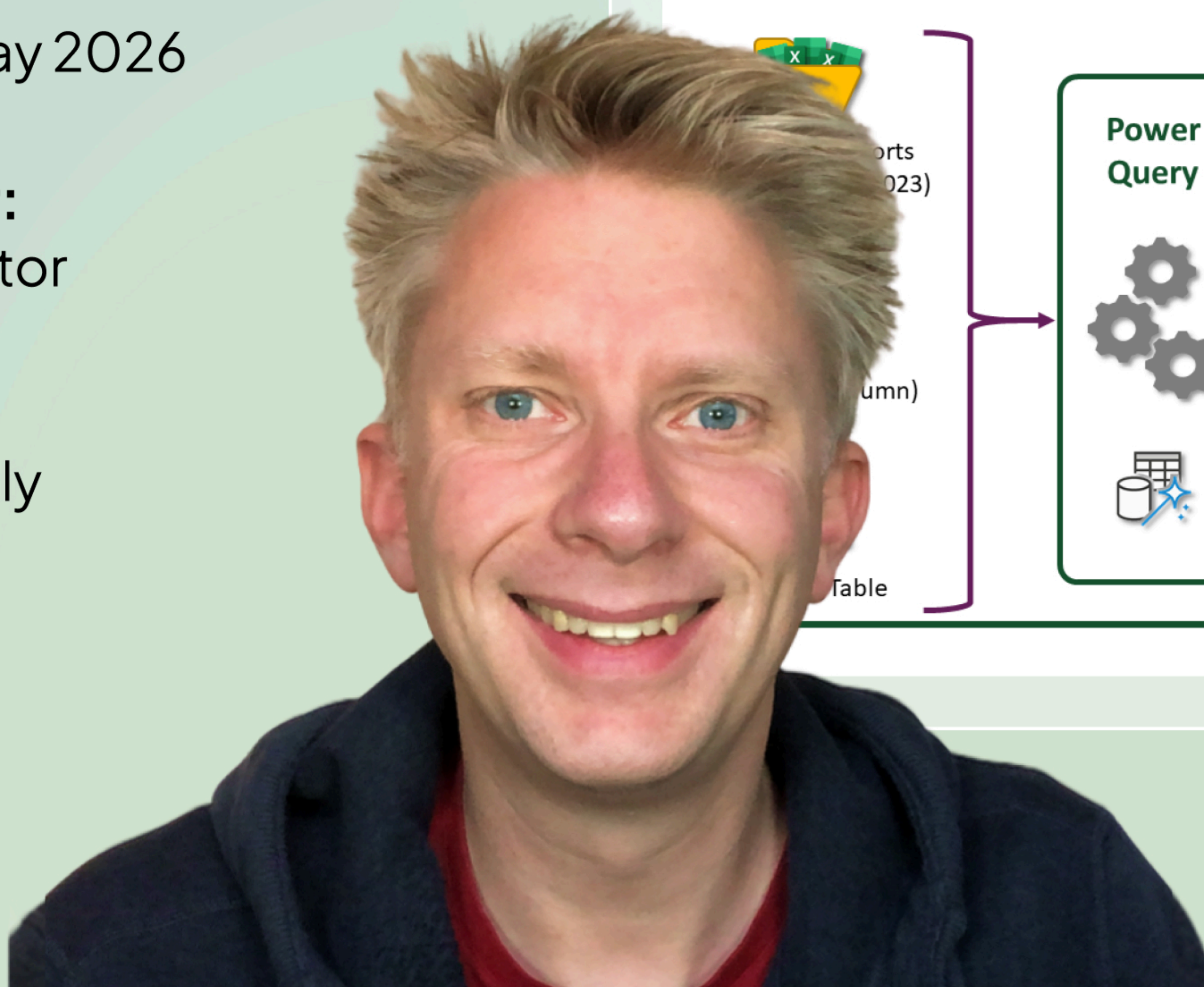


Automate Your Month End with Excel

Date:
25 & 26 May 2026

Instructor:
Mark Proctor

Format:
Online-only



	Actual	Budget	Variance
Tangible Assets	41,269	30,400	10,869
Intangible Assets	-	-	-
Fixed Assets	41,269	30,400	10,869
Trade Debtors	109,276	114,300	(5,024)
Cash at Bank	536,527	518,202	18,325
Current Assets	645,802	632,502	13,300
Trade Creditors	(28,781)	(28,300)	(481)
Accruals	(8,957)	(9,400)	443
VAT	(13,171)	(12,050)	(1,121)
PAYE/NIC	(23,425)	(25,200)	1,775
Provisions	(307,893)	(306,200)	(1,693)
Current Liabilities	(382,228)	(381,150)	(1,078)
Net Current Assets	263,574	251,352	12,222
Net Assets	304,843	281,752	23,091
Share Capital	2	2	-
Retained Earnings	304,841	281,750	23,091
Dividends	-	-	-
Shareholders Funds	304,843	281,752	23,091

Project



Reports
(2023)

Column)

Table

Power Query



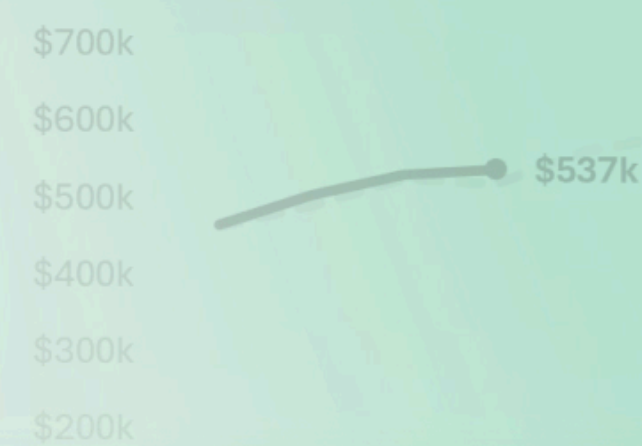
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Course outline

CASH



Overview

Learn how to structure data efficiently, automate repetitive tasks, and streamline every stage of your reporting so you can spend less time crunching numbers and more time doing what you love.

Excel is the key tool used by accountants every day. Yet, most finance month end processes are using Excel like it is still 2003. As a result, working late and feeling stressed is common during the month end cycle. It doesn't need to be that way.

Over the last 20 years, Excel features such as Tables, Power Query and Dynamic Arrays have been released. These enable users to automate month end tasks (without writing any code), and reclaim huge amounts of time.

This Masterclass will show you how to leverage these features. So you can spend less time at work, and more time doing what you love.

Learning outcomes *By the end of the course each learner will learn:*

- ✓ Why the traditional month-end processes are inefficient
- ✓ The 7 stages of the reporting and analysis blueprint
- ✓ Structuring data for efficient reporting
- ✓ Using the Refresh, Resize and Recalc cycle to automate journals, reconciliations, analysis and reporting
- ✓ Best practices in input management to enable automation
- ✓ Using dynamic parameters to easily repoint to new inputs
- ✓ Using Tables, Power Query and dynamic array formulas for automating processes
- ✓ Reshaping any inputs into an optimal data structure

Who is this course for?

This Masterclass is for any finance professionals who want to stop working late at month end by automating their work. The typical roles/teams that could benefit from this masterclass are:



Management Accountants



Commercial Accountants



Financial Control Professionals



Financial Planning & Analysis Professionals



Financial Reporting Professionals

Course contents

Introduction

- Reporting and analysis blueprint
- Tables
- Structured references
- Optimal data structure
- Controlling input

Power Query

- Unpivot Data
- Combine Files
- Append Queries
- Merge Queries
- Dynamic input paths

Formulas

- SUMIFS
- Dynamic Arrays

Useful VBA processes

- Workbook Open
- Change Cell Value
- Refresh Power Query
- Save PDF
- Workbook Save
- Workbook Close



Training requirements

Attendees will need an Office Scripts compatible licence in Microsoft 365. If you have the Automate tab in Excel, then you have a compatible licence.

No previous coding experience required to attend this Masterclass.

Why choose this course?

What's included

- ✓ 6 hours Masterclass with Mark Proctor, Microsoft MVP
- ✓ 6 hours of CPD (Continuing Professional Development) hours / points
- ✓ All downloadable presentation and working files
- ✓ Masterclass recording
- ✓ Certificate of attendance
- ✓ Join from anywhere in the world



Highly Recommended!

I would highly recommend for everyone to check out. I learned a great deal of time saving and stream lining techniques.

Eric H.



It was a very useful and productive experience.

The training set up, presentation and interactive discussions between participants are super helpful.

Jan Dijkstra



Extremely helpful!

I found the in-depth explanations of why we are doing certain things extremely helpful and they help to remember the content. Ingenious and the well-paced and friendly teaching style was very pleasant.

Stefan Euring

About your trainer



Mark Proctor

Owner of Excel Off The Grid,
Microsoft MVP



Mark Proctor is a qualified accountant, consultant and blogger who has been applying spreadsheet-based solutions to solve real-world problems **for over 20 years**.



Whilst working in the media, food, retail, and manufacturing sectors, he has built extensive dashboard, reporting, and process automation tools, to achieve greater business insight and efficiency.



Mark Proctor is also the owner of **Excel Off the Grid**, which started in October 2016. The site focuses on teaching intermediate and advanced Excel techniques so workplace warriors can become more efficient in Excel.

Course pricing

This course is available as a single Masterclass or as part of our Global Excel Summit [Premium Online ticket](#).

£196

Save 30%

Early bird price
ends 24 March 2026

£280

Regular price
25 March - 24 May 2026

£98

Save 65%

Student discounts

£714

Save additional 15%

Team of 3 discounts

up to
-40%

Bigger teams
Contact us today.

Pay by invoice

To pay by invoice, please contact Tea Kuseva at tea@globalexcelsummit.com. We will send you an invoice which you can submit to your accounts payable system.

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