

2022 WICPA NOT-FOR-PROFIT ACCOUNTING CONFERENCE

YOUR SOURCE FOR KEY UPDATES & INSIGHTS ON TIMELY ISSUES

TUESDAY, SEPT. 20
BROOKFIELD CONFERENCE CENTER
& WICPA CPE LIVESTREAM



2022 WICPA NOT-FOR-PROFIT ACCOUNTING CONFERENCE

MATERIALS AT A GLANCE

The following materials are from the morning sessions of the 2022 WICPA Not-For-Profit Accounting Conference held on Tuesday, Sept. 20, including:

- Accounting & Auditing Update
- Excel: Fast Track Data Cleanup
- Private Foundation & Donor Advised Funds Legislation

**VIEW THOUSANDS OF ADDITIONAL IN-PERSON AND
ONLINE CPE OPPORTUNITIES AT [WICPA.ORG/CPECATALOG](https://www.wicpa.org/cpecatalog)**



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UPCOMING WICPA CONFERENCES

YOUR SOURCE FOR KEY UPDATES
& INSIGHTS ON TIMELY ISSUES



NETWORK



LEARN



IMPLEMENT



SUCCEED

SAVE THE DATE!

Business & Industry Fall Conference

Wednesday, Oct. 26

Glacier Canyon Lodge, Wisconsin Dells

Accounting & Auditing Conference

Wednesday, Nov. 16

Brookfield Conference Center, Brookfield

Tax Conference

Thursday, Nov. 3 - Friday, Nov. 4

Brookfield Conference Center, Brookfield

Accounting Technology Conference

Thursday, Dec. 8

Brookfield Conference Center, Brookfield



WICPA members save up to \$150 on registration!

Registration opens approximately eight weeks prior to a conference. View conferences currently open for registration at wicpa.org/conferences.

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2023
WICPA

Excellence

★ ★ ★

★ ★ A W A R D S



NOMINATE SOMEONE YOU KNOW FOR AN EXCELLENCE AWARD!

- ★ Accounting Educator
- ★ Accounting Student
- ★ Business & Management
- ★ CPA in Public Practice
- ★ Community Service
- ★ Distinguished Career
- ★ Diversity & Inclusion
- ★ Woman to Watch
- ★ Young Professional

Submit your nomination at wicpa.org/awards by Nov. 10, 2022.

Recipients will be announced in January and honored at the
Member Recognition Banquet & Annual Business Meeting on May 5, 2023.

10 – 10:50 a.m.

Excel: Fast Track Data Cleanup

Jennifer Buchholz, MOS, MCT, Owner and Lead Trainer, Excel & Flourish



If you download, clean up and make meaning of mountains of data, you may find you're spending more time than necessary in that clean up phase. This session is a quick orientation to the variety of ways to clean up data in Excel with some options for automating that cleanup. We'll cover the old favorites: text to columns, text case formatting, flash fill and others. We'll also introduce you to a not so common feature for automating data cleanup – Power Query.



Data scientists spend

- 60% of their time on cleaning and organizing data
- 19% of their time collecting data sets comes =

around 80% of their time on preparing and managing data for analysis.

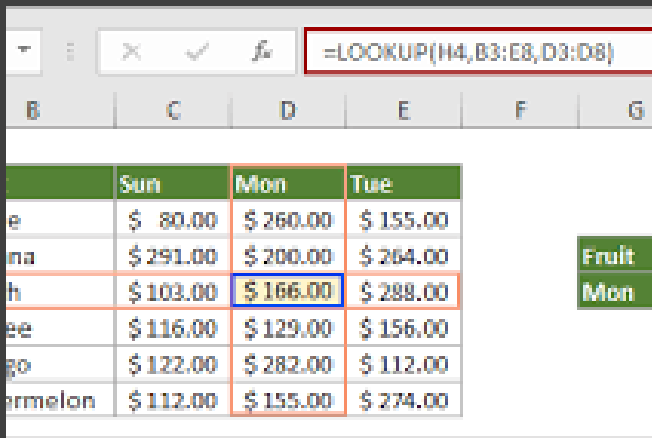
– Forbes 2016

NO CODE Data Cleanup in Excel

A	B	C
Participants	Country	
Ronnie Anderson, UK	UK	
Tom Boone, Canada	Canada	Flash Fill
Sally Brook, USA	USA	
Jeremy Hill, Australia	Australia	Undo Flash Fill
Mattias Waldau, USA	USA	Accept Flash Fill
Robert Furlan, France	France	Select a different fill
David White, UK	UK	Select a different fill

- Flash Fill
- Macros (no VBA coding required)
- PowerQuery
- Connecting Data

Connecting Data



Formula Bar: `=LOOKUP(H4,B3:E8,D3:D8)`

	Sun	Mon	Tue
e	\$ 80.00	\$ 260.00	\$ 155.00
na	\$ 291.00	\$ 200.00	\$ 204.00
h	\$ 103.00	\$ 166.00	\$ 288.00
ee	\$ 116.00	\$ 129.00	\$ 156.00
go	\$ 122.00	\$ 282.00	\$ 112.00
armelon	\$ 112.00	\$ 155.00	\$ 274.00

- HLOOKUP
- VLOOKUP
- XLOOKUP
- INDEX MATCH
- Or... 2 alternatives
 - Relationships in PivotTables
 - PowerQuery

When is the last time you
skilled up in Excel?

When is the last time your
team skilled up in Excel?



Upcoming Classes with WICPA

- 10/19/22 Excel: Tips, Tricks & Shortcuts
- 4/14/23 Excel: Fast Track Data Cleanup



Jennifer Buchholz
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Optimizing Remote Worker Ex



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