

AI Tools Field Guide Not affiliated with OpenAI, Google, xAI or Anthropic; your organization's rules come first.

Describe the columns, ask for the formula, and let Excel do the counting the model cannot do in its head.



Set it up

- **Describe the columns, never paste them.** "Column A a member ID, B the qualification, C the date earned": the shape without the people.
- **Placeholders, not names.** If you need example rows at all, use MEMBER-01 through MEMBER-05 and nothing more.
- **Say which Excel you have.** Your version decides whether XLOOKUP is available or whether you need INDEX and MATCH.
- **Say what the sheet is for.** Expiring quals, training due, a muster board: the purpose picks the formula.

Work it in four passes

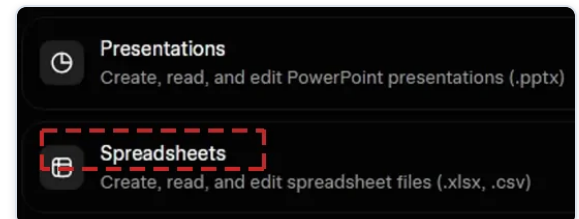
- 1 **Ask for the formula, not the answer.** "Give me the COUNTIFS formula; do not work out the count yourself." Its arithmetic is the weak part.
- 2 **Name one job at a time.** A days-until-due column, an XLOOKUP against the roster tab, conditional formatting for quals expiring inside thirty days.
- 3 **Ask it to explain each formula.** One line per argument, so you can still repair the sheet in six months.
- 4 **Test on three rows you know.** One current, one expiring this month, one already lapsed. Wrong on any of the three means start again.

Say it like this

PROMPT TO COPY

My sheet has a member ID in column A, a qualification name in B, the date earned in C. Data runs to row 200.

Give me an Excel formula for days until the qualification expires, and a conditional formatting rule that turns the row amber inside 30 days. Explain each argument.



Grok's Spreadsheets skill can build a blank tracker with the formulas in place. Add the names yourself.

TAKE AWAY

It writes a far better formula than it works out a total. Put the formula in the sheet, test three rows, and let Excel keep the count.

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