



# Astute Excel: Custom Views

Written and Presented by  
David H. Ringstrom, CPA  
Accounting Advisors, Inc.  
[www.accountingadvisors.com](http://www.accountingadvisors.com)



**About the speaker:**

David H. Ringstrom, CPA, is an author and nationally recognized instructor who teaches scores of webinars each year. His Excel courses are based on over 25 years of consulting and teaching experience. His mantra is “Either you work Excel, or it works you.” David offers spreadsheet and database consulting services nationwide.

# Excel Versions

I'll be teaching from the Microsoft 365 version of Excel, and noting any differences or limitations in the legacy versions of Excel.

## The Future of Excel

### Microsoft 365 (Formerly Office 365)

Subscription-based version of Microsoft Office, which includes Excel. Use the software on multiple devices, new calculation engine, services and more features are rolling out that will dramatically set this version apart from past Excel versions.  
www.microsoft365.com


## Legacy Versions

### Perpetual Licenses

Pay once for the software to use on a single computer. No new features added until you buy a new license. Includes  
Excel 2019  
Excel 2016  
Excel 2013  
Excel 2010  
Excel 2007 and earlier

References to Excel 2013+, Excel 2016+, and so on mean a feature is available in all subsequent versions, including Microsoft 365.

You can play back a recording of this presentation for free by way of your Professionals Excel account.



1 File Home Insert Page Layout

2 Copy

I demonstrate each technique at least twice, first by way of numbered steps in PowerPoint, and then in Excel.

Handouts include PDF of today's presentation along with an example workbook that contains most examples I'll teach from as well as related articles.  
Email [ask@daavidringstrom.com](mailto:ask@daavidringstrom.com) if you haven't received the handouts.

Related Articles Car Payme





# Overview of Excel's Custom Views Feature

**Custom views are specific to the workbook that you create the view within, and cannot be used in other workbooks.**

**1** View

**2** Custom Views

**3** Add...

**4** Name: |

**5** OK

Most workbooks do not contain any custom views, which must be added manually unless you're using the Shared Workbook feature.

Names can contain any characters. Name field will display up to 41

Custom Views only capture and apply settings, not actual data. In Excel 2013 and later a Custom View stores and applies window sizes as well.



# Group Worksheets

**1** Select the first sheet you wish to include in the group.

1	January	
2	Sales	
3	Product Sales	84,354
4	Services	15,896
5	Cost of Goods Sold	12,655

**2** Hold down the Shift key and click the last sheet you wish to include in the group (or hold Ctrl key as you select individual worksheets)

1	Quarter4	
2	Sales	
3	Product Sales	213,135
4	Services	132,700
5	Cost of Goods Sold	81,520

**3** Click on cell A2 and type the word Revenue.

1	Quarter4	
2	Revenue	
3	Product Sales	213,135
4	Services	132,700
5	Cost of Goods Sold	81,520

**4** Cell A2 has been changed to display Revenue on every worksheet in the group.

1	Quarter4	
2	Revenue	
3	Product Sales	213,135
4	Services	132,700
5	Cost of Goods Sold	81,520

**5** To ungroup the worksheets, first right-click any sheet within the group.

**6** Select All Sheets  
Ungroup Sheets

The word Group appears at the top of the screen when two or more sheets are grouped. Do not leave sheets grouped longer than needed.





# Hide and Unhide Worksheets

**1** Select the first sheet you wish to include in the group.

**2** Hold down the Shift key and click the last sheet you wish to include in the group (or hold Ctrl key as you select individual worksheets)

**3** Right-click any worksheet.

**4** Hide

**5** Only a single worksheet is displayed.

**6** Right-click any worksheet.

**7** Unhide...

**8** Double-click to unhide any single worksheet. Repeat steps 6-8 as needed.

Worksheet	Product Sales	Services	Other	Total Revenue	Cost of Goods Sold
January	84,354	15,896			12,765
Quarter4			1,573		
Summary					81,520



# Unhide All Worksheets in a Workbook

**1** Revenue January Feb

Press Alt-F11 to display Excel's Visual Basic Editor.

**2** View

**3** Immediate Window

**4** Type this line of code and press Enter. Capitalization does not matter, you can type in all lower-case if you wish.

```
For each s in Sheets: s.Visible=True: Next
```

**5**

**6** All worksheets are unhidden.

	A	B	C	D	E	F
1	Summary					
2	Revenue	January	February	March	April	May
3	Product Sales	84,354	145,865	32,545	27,562	18,021
4	Services	15,896	25,432	42,555	45,222	27,433
5	Other	1,573	2,154	2,165	2,375	2,345
6	Total Revenue	101,823	172,551	77,265	75,159	47,799
7	Cost of Goods Sold	12,765	14,526	36,554	14,358	35,224





# All Worksheets Custom View

	A	B	
1	Summary		
2	Revenue	January	Feb
3	Product Sales	84,354	1
4	Services	15,896	
5	Other	1,573	
6	Total Revenue	101,823	17
7	Cost of Goods Sold	12,765	1
8	Gross Profit	89,058	15
9	Operating Expenses		
10	Wages	34,750	
11	Rent	2,500	
12	Utilities	378	
13	Interest	415	
14	Depreciation	525	
15	T		3
16	N		12
17			

**1** Make sure that all worksheets are visible.

The screenshot shows the Excel ribbon with the **View** tab selected (2). In the **Workbook Views** group, **Custom Views** is circled (3). The **Custom Views** dialog box is open, showing the **Add...** button circled (4). The **Add View** dialog box is also open, with the **Name** field containing "All Worksheets" circled (5), and the **OK** button circled (6).

	A	B	C	D	E	F
1						
2				March	April	May
3				32,545	27,562	18,023
4				42,555	45,222	27,433
5				2,165	2,375	2,345
6				77,265	75,159	47,799
7	Cost of Goods Sold	12,765				
8	Gross Profit	89,058				
9	Operating Expenses					
10	Wages	34,750				
11	Rent	2,500				



# Creating a Custom View to Hide Worksheets

	A	B	
1	<b>Summary</b>		
2	<b>Revenue</b>	<b>January</b>	<b>Feb</b>
3	Product Sales	84,354	1
4	Services	15,896	
5	Other	1,573	
6	<b>Total Revenue</b>	<b>101,823</b>	<b>17</b>
7	<b>Cost of Goods Sold</b>	<b>12,765</b>	<b>1</b>
8	<b>Gross Profit</b>	<b>89,058</b>	<b>15</b>
9	<b>Operating Expenses</b>		
10	Wages	34,750	
11	Rent	2,500	
12	Utilities	378	
13	Interest	415	
14	Depreciation	525	
15			
16	<b>Net Income</b>	<b>50,490</b>	<b>12</b>
17			

**1** Hide all worksheets except the Summary worksheet.

**Summary**

**2** View

**3** Custom Views

**4** Add...

**5** Name: Summary Only

**6** OK





# Utilizing a Custom View

**1** Hide all worksheets except the Summary worksheet.

**2** View

**3** Custom Views

**4** Show

**5** All worksheets are visible.

	A	B	C	D	E	F
1	Summary					
2	Revenue	January	February	March	April	May
3	Product Sales	84,354	145,865	32,545	27,562	18,021
4	Services	15,896	25,432	42,555	45,222	27,433
5	Other	1,573	2,154	2,165	2,375	2,349
6	Total Revenue	101,823	173,956	77,265	75,159	47,799
7	Cost of Goods Sold	12,765	14,526	554	14,358	35,224
8	Gross Profit	89,058	159,430	76,711	60,801	12,575
9	Operating Expenses					
10	Wages	34,750				
11	Rent	2,500				
12	Utilities	378				
13	Interest	415				
14	Depreciation	525				
15						
16	Net Income	50,490	144,904	76,157	45,793	10,351
17						



# Protect the Workbook

**1** Choose Custom Views from the View menu.

**2** Double-click Summary Only to skip the Show button.

**3** Review

**4** Protect Workbook

**5** Password (optional):  
\*\*\*\*\*

**6** OK

**7** Reenter password to proceed.  
\*\*\*\*\*

**8** OK

Protecting a workbook prevents users from being able to unhide, move, or delete worksheets without first unprotecting the workbook.

	July	August	September	October
15,222	68,457	78,657	78,4	
63,224	35,684	42,511	23,9	
1,542	2,541	1,086	6,7	

	Summary	January	February			
7	Cost of Goods Sold	12,765	164	14,358	35,224	24,866
8	Gross Profit	89,058	15,1	60,801	12,575	100,260
9	Operating Expenses					
10	Wages	34,750	50	34,750	34,750	34,750





# Custom Views and Protected Workbooks

**8** View

**9** Custom Views

**10** All Sheets

**11** Show

**12** No feedback appears if the workbook is protected, nor does the number of visible sheets change.

**13** Review

**14** Protect Workbook

**15** Password: \*\*\*\*\*

**16** OK

**13** Income Statement.xlsx - Excel

**14** Income Statement.xlsx - Excel

	March	April	May	June
	32,545	27,562	18,021	63,509
Services	15,896	25,432	27,433	60,262
Other	1,573	2,154	2,345	1,355
	75,159	47,799	125,126	
	14,358	35,224	31,866	
Gross Profit	69,058	158,925	40,711	60,801

Summary

Custom Views dialog box:

- Views: All Sheets, Summary Only
- Show
- Close
- Add...
- Delete

Unprotect Workbook dialog box:

- Password: \*\*\*\*\*
- OK
- Cancel

Custom views that hide or display worksheets only in workbooks that are not protected.



# Streamlining Custom Views

**1** Click the arrow on the Quick Access Toolbar.

**2** Click **More Commands...**.

**3** Choose a workbook that has custom views within it.

**4** **Commands Not in the Ribbon**.

**5** **Custom Views**.

**6** **Add >>**.

**7** **OK**.

**8** Any view can be chosen from this list without having to activate the View menu.

**9** Optional: To remove the list right-click on the arrow.

**10** **Remove from Quick Access Toolbar**.

The screenshots show the following data in the background spreadsheet:

	Summary	January	February
1	Summary		
2	Revenue		
3	Product Sales		
4	Services		
5	Other		
6	Total Revenue		
7	Cost of Goods Sold		
8	Gross Profit		
9	Operating Expenses		
10	Wages	34,750	





# Updating Custom View Settings

12 Month Income Statement - Excel

File Home Insert Page Layout Formulas Data Review **View** Tell me what you want to do Share

Normal Page Preview **2** Custom Views Ruler Formula Bar Gridlines Headings Zoom 100% Zoom to Selection New Window Arrange All Freeze Panes Switch Windows Macros

**3** Add... Alternative: delete and then add back an existing view.

**4** Type the name of an existing Custom View.

**5** OK

**6** Yes

	March	April	May	June	July	August	September
Total Revenue	42,555	45,222	27,433	60,262	15,222	68,457	
Cost of Goods Sold	2,165	2,275	2,345	1,355	1,543	3,541	
Operating Expenses							
Wages							



# Custom Views - Multipurpose Worksheets

**1** Click to select the entire worksheet.

**2** Right-click any column.

**3** Unhide

**4** Right-click any row.

**5** Unhide

**6** Click on cell A1.

**7** Choose Custom Views on the View menu.

**8** Add...

**9** All Periods

**10** OK

	January	February
5	Materials Income	4,119
6	Subcontracted Labor Income	600
8	Total Income	24,948
9	Cost of Goods Sold	
10	Job Materials	8,270





# Custom Views - Multipurpose Worksheets

**1** Hold down the Ctrl key and select columns E, I, M, and Q (all 4 of the Quarter columns)

**2** Right-click column Q.

**3** Hide

**4** Select Custom Views from the View menu.

**5** Add...

**6** Name: Months Only  
Include in view  
 Print settings  
 Hidden rows, columns and filter settings

**7** OK

**8** Select Custom Views from the View menu.

**9** Double-click All Periods to skip the Show button and unhide all columns at once. Add additional views as needed.

Income	75,300
Total Income	75,300
Cost of Goods Sold	16,000
Job Materials	16,000
Subcontractors	300
Total COGS	8,570
Gross Profit	16,378
Expense	



# Zoom to Selection

**1** Select cells A1:R1 (optional: hide quarter columns if necessary, goal is to have a report that just slightly expands off the screen by one or two columns.)

**2** Click the View tab on the ribbon.

**3** Click the Zoom to Selection button.

**4** All the selected columns now appear onscreen.

**5** Click 100% to return your worksheet to Excel's default zoom size.

	A	K	L	M	N	O	P	Q	R	S
1		August	September	Quarter3	October	November	December	Quarter4	2018	
2	<b>Income</b>									
3		3,900	3,303	10,257	3,000	-	3,000	6,000	36,729	
4						385	20,378	60,434	208,225	
5						256	12,402	59,788	119,921	
6						910	15,461	54,221	82,710	
8										
8		41,970	39,014	109,173	61,051	67,551	51,241	180,443	447,586	
9	<b>Cost of Goods Sold</b>									
10		13,171	9,052	27,304	24,764	9,579	9,046	43,388	62,013	

	A	H	J	K	L	N	O	P	R
		June	July	August	September	October	November	December	2018





# Zoom Features

**1** View

**2** Zoom

**3** Double-click the magnification level to skip the OK button.

**4** Text at 200% Magnification.

**5** Click on 100% to restore the normal size.

Alternative: Hold the Ctrl key while you use the wheel on your mouse to zoom in or out.

Tip: Custom zoom can be as little as 10% or as much as 400%.

	A	R	S
1		<u>2018</u>	
8	<b>Total Income</b>	<b>447,586</b>	
13	<b>Total COGS</b>	<b>141,631</b>	
14	<b>Gross Profit</b>	<b>305,955</b>	
27	<b>Total Expense</b>	<b>74,721</b>	
28	<b>Net Ordinary Income</b>	<b>231,233</b>	
29			
30			
31			
32			
33			
34			
35			
36			



# Custom Views and Protected Worksheets

**1** View

**2** Custom Views

**3** Show

**4** OK

**5** Review

**6** Unprotect Sheet

Custom Views may not work on protected worksheets.

	M	Q	R
	Quarter3	Quarter4	2018
022	10,257	6,000	36,729
031	50,395	60,434	208,225
032	29,793	59,788	119,921
068	19,328	54,221	82,710
033	109,773	180,443	447,586
150	27,304	43,388	62,013
070	11,702	46,791	79,618
220	39,006	90,179	141,631
814	70,768	90,264	305,955

Income Statement





# Creating a Custom View to Print Worksheets

**1** Hide all the quarter columns so that only month columns are left.

	January	February	March	April	May	June	July	August	September	October	November	December	2018
<b>Income</b>													
Design Income	3,000	3,150	3,000	2,700	2,850	2,700	2,850	2,700	2,850	2,700	2,850	2,700	36,729
Labor Income													208,225
Materials Income													119,921
Subcontracted													82,710
<b>Total Income</b>	<b>24,948</b>	<b>24,847</b>	<b>25,541</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>20,514</b>	<b>447,586</b>
<b>Cost of Goods Sold</b>													
Job Materials	8,270	4,892	2,932	2,927	2,927	2,927	2,927	2,927	2,927	2,927	2,927	2,927	62,013

**2** Page Layout

**3** Orientation

**4** Landscape

**5** Choose Custom Views from the View menu.

**6** Add...

**7** Add View

**8** OK

**7** Name: Landscape View

Include in view

- Print settings
- Hidden rows, columns and filter settings



# Creating a Custom View to Print Worksheets

**9** Hide all the month columns so that only quarter columns are left.

	A	E	I	M	Q	R
1		<u>Quarter1</u>	<u>Quarter2</u>	<u>Quarter3</u>	<u>Quarter4</u>	<u>2018</u>
2	<u>Income</u>					
3	Design Income	9,450	10,022	10,257	6,000	36,729
4	Labor In			50,395	60,434	208,225
5	Materials			29,793	59,788	119,921
6	Subcontra			19,328	54,221	82,710
8	<b>Total Income</b>	<b>75,336</b>	<b>82,033</b>	<b>109,773</b>	<b>180,443</b>	<b>447,586</b>
9	<u>Cost of Goods Sold</u>					
10	Job Materials	16,094	12,150	27,304	43,388	62,013

**10** Page Layout

**11** Custom Views

**12** Portrait

**13** Choose Custom Views from the View menu.

**14** Show

**15** Add View  
Name: Portrait View

**16** OK

Select a view and choose Show when needed.





# Creating a Custom View to Print Worksheets

**1** Choose Custom Views from the View menu.

**2** Landscape View

**3** Show

**4** Press Ctrl-P to print the custom view selected in step 2.

**5** The resulting Print Preview of month columns will be in landscape orientation.

**Printer**  
Send To OneNote 2016  
Ready

**Settings**  
Print Active Sheets  
Only print the active sheets  
Pages: 1,2,3 to 1,2,3  
Collated  
Landscape Orientation  
Letter  
8.5" x 11"

	January	February	March	April
<b>Income</b>				
Design Income	3,000	3,150	3,300	2,700
Labor Income	17,229	12,420	15,117	13,855
Materials Income	4,119	6,539	5,370	3,578
Subcontracted Labor Income	600	2,738	1,755	382
<b>Total Income</b>	<b>24,948</b>	<b>24,847</b>	<b>25,541</b>	<b>20,515</b>
<b>Cost of Goods Sold</b>				
Job Materials	8,270	4,892	2,932	2,927
Subcontractors	300	700	1,655	-
<b>Total COGS</b>	<b>8,570</b>	<b>5,592</b>	<b>4,587</b>	<b>2,927</b>
<b>Gross Profit</b>	<b>16,378</b>	<b>19,255</b>	<b>20,954</b>	<b>17,589</b>
<b>Expense</b>				
Automobile	1,091	376	386	1,060
Bank Service Charges	13	13	13	13
Insurance	1,628	1,630	1,625	1,628
Interest Expense	271	189	235	274
Payroll Expenses	9,307	9,359	9,459	9,247
Postage	-	-	-	-
Professional Fees	-	-	-	-
Repairs	-	-	450	-
Tools and Machinery	-	-	-	446
Utilities	283	180	165	201
<b>Total Expense</b>	<b>12,592</b>	<b>11,746</b>	<b>12,333</b>	<b>12,867</b>



# Creating a Custom View to Print Worksheets

**6** Choose Custom Views from the View menu.

**7** **8**

**9** Press Ctrl-P to print the custom view selected in step 7.

**10** The resulting Print Preview of quarter columns will be in portrait orientation.

**Print**

**Printer**

Send To OneNote 2016  
Ready

**Settings**

Print Active Sheets  
Only print the active sheets

Pages: to

Collated  
1,2,3 1,2,3 1,2,3

Portrait Orientation

Letter  
8.5" x 11"

	Quarter1	Quarter2	Quarter3
<b>Income</b>			
Design Income	9,450	11,022	10,234
Labor Income	44,766	52,631	50,321
Materials Income	16,028	14,312	29,765
Subcontracted Labor Income	5,093	4,068	19,321
<b>Total Income</b>	<b>75,336</b>	<b>82,033</b>	<b>109,741</b>
<b>Cost of Goods Sold</b>			
Job Materials	16,094	12,150	27,321
Subcontractors	2,655	2,070	11,765
<b>Total COGS</b>	<b>18,749</b>	<b>14,220</b>	<b>39,086</b>
<b>Gross Profit</b>	<b>56,587</b>	<b>67,814</b>	<b>70,655</b>
<b>Expense</b>			
Automobile	1,853	1,808	1,808
Bank Service Charges	38	38	38
Insurance	4,882	5,283	5,000
Interest Expense	695	641	641
Payroll Expenses	28,125	31,846	27,321
Postage	-	-	-
Professional Fees	-	-	-
Repairs	450	450	450





# Custom Views to Manage Excel Features

**1** File

Home Insert Page Layout Fo

Share

Export

Publish

Close

Account

Feedback

**2** Options

Check for Issues

Manage Workbook

Browser View Options

Excel Options

General

Formulas

Proofing

Save

Language

Advanced

Customize Ribbon

Display options for this worksheet: Loan Calculator

- Show row and column headers
- Show formulas in cells instead of their calculated results
- Show sheet right-to-left
- Show page breaks
- Show a zero in cells that have zero value
- Show outline symbols if an outline is applied
- Show gridlines

Gridline color

**4** All settings circled in red are captured when you create a custom view.

Loan Calculator - Excel

File Home Insert Page Layout Formulas Data Review View Help

Margins Orientation Breaks Width: Automatic Height: Automatic Scale: 100%

Print Area Background Print Titles

Page Setup Scale to Fit

Gridlines View View

Sheet Right-to-Left Print Print

Sheet Options

File Home Insert Page Layout Formulas Data Review View Help

Normal Page Break Custom Views Ruler Formula Bar

Gridlines Headings

Zoom 100% Zoom to Selection Freeze Panes







# Filtering Data with Custom Views

**1** Click any cell within the list.

**2** Data

**3** Filter

**4**

**5**

**6** OK

**7** Filter column D for Apples and Oranges.

Region	City	Vendor
North GA	Atlanta	Fruit R Us
North GA	Atlanta	Fruit R Us
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit
North GA	Atlanta	Bob's Fruit

City	Vendor	Product
Atlanta	Fruit R Us	Oranges
Atlanta	Fruit R Us	Apples
Atlanta	Bob's Fruit	Oranges
Atlanta	Bob's Fruit	Apples
Atlanta	Fruitju	Oranges
Atlanta	Fruitju	Apples
Atlanta	Orange U Glad	Oranges
Atlanta	Orange U Glad	Apples



# Filtering Data with Custom Views

**8 Choose Custom Views on the View menu.**

**9 Add...**

**10 Atlanta Apples/Oranges**

**11 OK**

**12 Data**

**13 Filter**

**14 The list is no longer filtered.**

**15 Choose Custom Views on the View menu.**

**16 Atlanta Apples/Oranges**

**17 Show**

**18 The custom view applies the filter settings.**

	D	E	F
	Product	Cases Sold	Total Sales
Us	Oranges	6168	61680
Us	Apples	6079	85106
Us	Kiwi	6058	66638
Us	Bananas	6868	75548
Us	Mixed Berries	1996	29940
fruit	Oranges	7818	93816
fruit	Apples	1565	21910
fruit	Kiwi	9967	99670
fruit	Bananas	9842	98420
fruit	Mixed Berries	8993	89930
fruit	Oranges	54263	542630

	B	C	D
	City	Vendor	Product
2	Atlanta	Fruit R Us	Oranges
3	Atlanta	Fruit R Us	Apples
7	Atlanta	Bob's Fruit	Oranges
8	Atlanta	Bob's Fruit	Apples
12	Atlanta	Fruitju	Oranges
13	Atlanta	Fruitju	Apples
17	Atlanta	Orange U Gla	Oranges





# Tables Conflict With Custom Views

**19** File Home **Insert** Page Layout

**20** PivotTable Recommended Table Pictures

**21** Create Table  
Where is the data for your table?  
=SAS1:SFS51  
 My table has headers  
OK Cancel

**22** Custom Views  
Adding a table anywhere in a workbook disables the custom views command in Excel for Windows. You can use the Table feature and Custom Views together in Excel for Mac.

**23** Custom Views  
Views:  
Atlanta Apples/Oranges  
Removing all tables from a workbook restores access to custom views. The views remain intact while tables are present in the workbook.

Region	City	Vendor	Product
North GA	Atlanta	Orange U Glad	Oranges
North GA	Atlanta	Orange U Glad	Oranges



# Undoing the Table Feature

**1** Click the **Design** tab in the **Table Tools** ribbon.

**2** Click the **Convert to Range** button in the **Tools** group.

**3** Select a table style from the **Light** gallery.

**4** The formatting is removed but the list is still a table.

**5** Optional: Click **Convert to Range** on the **Design** menu.

**6** Click **Yes** in the **Microsoft Excel** dialog box: "Do you want to convert the table to a normal range?"

**7** The list is now a normal range of cells. Any pivot tables based on the table are now based on a static range of cells.

Region	City	Vendor	Product	Cases Sold	Total Sales	
4	North GA	Atlanta	Fruit R Us	Kiwi	6,058	66,63
5	North GA	Atlanta	Fruit R Us	Bananas	6,868	75,54
6	North GA	Atlanta	Fruit R Us	Mixed Berries	1,996	29,94
7	North GA	Atlanta	Fruit R Us	Mixed Berries	1,996	93,81
8	North GA	Atlanta	Fruit R Us	Mixed Berries	1,996	21,91
9	North GA	Atlanta	Bob's Fruit	Kiwi	9,907	99,67
10	North GA	Atlanta	Bob's Fruit	Bananas	9,842	98,42
11	North GA	Atlanta	Bob's Fruit	Mixed Berries	8,993	89,93
12	North GA	Atlanta	Fruitju	Oranges	4,933	54,26
13	North GA	Atlanta	Fruitju	Apples	7,704	107,85
14	North GA	Atlanta	Fruitju	Kiwi	5,519	71,74

	A	B	C
4	North GA	Atlanta	Fruit R Us
5	North GA	Atlanta	Fruit R Us
6	North GA	Atlanta	Fruit R Us
7	North GA	Atlanta	Bob's Fruit
8	North GA	Atlanta	Bob's Fruit
9	North GA	Atlanta	Bob's Fruit
10	North GA	Atlanta	Bob's Fruit
11	North GA	Atlanta	Bob's Fruit
12	North GA	Atlanta	Bob's Fruit
13	North GA	Atlanta	Fruitju





# Custom Views to Resize Excel

**1** Excel 2013 and later: Adjust the size of the application window to be less than full-screen.

**2** View

**3** Custom Views

**4** Add...

**5** Name: Windowed Excel

**6** Print settings  
Hidden rows, columns and filter settings

**7** OK

**8** Gross Profit 89,058

**9** Make Excel full-screen and then carry out steps 1-7 again to create a Full Screen Excel view. You'll then be able to toggle the window slide between small and large on demand, such as if you sometimes need to see Excel and another application onscreen at the same time.

	A	B
1	Summary	
2	Revenue	January Feb
3	Add View	
4		
5		
6		
7		
8	Gross Profit	89,058 15
9		
10		
11		
12		
13		
14		
15		
16		
17		



# Manage Frozen Panes with Custom Views

1

2

3

**Freeze Panes**  
Keep rows and columns visible while the rest of the worksheet scrolls (based on current selection).

**Freeze Top Row**  
Keep the top row visible while scrolling through the rest of the worksheet.

**The Custom Views feature captures the frozen or unfrozen status of a worksheet and applies the settings when you apply the view.**

**If you create a custom view first, and then subsequently freeze or unfreeze the panes then applying the custom view may undo the status of the panes.**





# Capture Cell Selection with Custom Views

**1** Select any range of cells.

**2** View

**3** Custom Views

**4** Add...

**5** Name: Select a range of cells

**6** Optional: Clear these checkboxes.

**7** OK

**8** When you choose the view the range of cells will be selected automatically.



# Shared Workbooks/Custom Views

The image shows the Excel interface with several callouts and dialog boxes:

- 1**: Points to the **Review** tab on the ribbon.
- 2**: Points to the **Protect and Share Workbook** button on the ribbon.
- 3**: Points to the **Advanced** tab in the **Share Workbook** dialog box, specifically to the checkbox **Allow changes by more than one user at the same time. This also allows workbook merging.**
- 4**: Points to the **Advanced** tab in the **Share Workbook** dialog box.
- 5**: Points to the **Advanced** tab in the **Share Workbook** dialog box, specifically to the **Track changes** section.
- 6**: Points to the **OK** button in the **Share Workbook** dialog box.

**Share Workbook enables you to share the workbook, while Protect and Share Workbook password protects and then shares the workbook so that users cannot disable Track Changes.**

**Excel automatically creates a custom view for each user that accesses a shared workbook. You can control these two aspects of the custom view here, but cannot prevent the view itself from being created.**

**Print settings**  
**Filter settings**





# Removing All Custom Views from a Workbook

**1** Press Alt-F11 to display Excel's Visual Editor

**2** View

**3** Immediate Window Ctrl+G

**4** Type this line of code exactly as it appears here, and press Enter. You'll only get feedback if you mistype the macro.

```
For Each v In ActiveWorkbook.CustomViews: v.Delete: Next
```

**5** Close the Visual Basic Editor. All sheets within your workbook will now be unhidden.

Click End if you encounter a Debug prompt.

Microsoft Visual Basic for Applications - FUNCRES.XLAM

File Edit View Insert Format Debug Run Tools Add-Ins Window Help

Code F7  
Object Shift+F7  
Definition Shift+F2  
Last Position Ctrl+Shift+F2  
Object Browser F2  
Immediate Window Ctrl+G  
Locals Window  
Watch Window

Microsoft Visual Basic for Applications - FUNCRES.XLAM

File Edit View Insert Format Debug Run Tools Add-Ins Window Help

Immediate

```
For Each v In ActiveWorkbook.CustomViews: v.Delete: Next
```

# Thank you for attending!

I'm happy to hear from you. In particular let me know if you did not receive the handouts for this presentation.

**David Ringstrom, CPA**



**ask@davidringstrom.com**



**www.twitter.com/excelwriter**



**www.linkedin.com/in/davidringstrom**

Is there something you were hoping to learn today but didn't?  
Please let me know. You can ask me anything about Excel.