Using the Excel Built-In Data Entry Form

When entering data into an Excel list, some people prefer to use Excel’s data entry form — a dialog box that adjusts to your data. Before you can use this form, you have to set up the column headers in your worksheet. Alternatively, you can designate the data range as a table, by choosing Insert ➜ Tables ➜ Table.

The Data Form command doesn’t appear on the Ribbon, so you need to do a bit of prep work. Here’s how to add the command to the Quick Access toolbar:

1. Right-click the Quick Access toolbar and choose Customize Quick Access Toolbar from the shortcut menu.

   Excel displays the Quick Access Toolbar tab of the Excel Options dialog box.

2. In the drop-down list on the left, choose Commands Not in the Ribbon.

3. In the list box on the left, choose Form and then click the Add button.

4. Click OK to close the Excel Options dialog box.

After you perform these steps, your Quick Access toolbar includes a new icon that, when clicked, displays the data entry form.

Activate any cell within your list and choose the Form command from your Quick Access toolbar. You see a dialog box like the one shown in Figure 1. (The fields shown in the dialog box vary, depending on your column headers.)

If the number of columns in your list exceeds the limit of your display, the dialog box contains two columns of field names. If your list consists of more than 32 columns, however, the Form command doesn’t work. You must forgo this method of data entry and enter the information directly into the cells.
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When the Data Form dialog box appears, the first record (if any) in the list is displayed. Notice the indicator in the upper right corner of the dialog box; this indicator tells you which record is selected and the total number of records in the list.

To enter a new record, click the New button to clear the fields. Then you can enter the new information into the appropriate fields. Press Tab or Shift+Tab to move among the fields. When you click the New (or Close) button, the data that you entered is appended to the bottom of the list. You also can press Enter, which is equivalent to clicking the New button. If your list contains any formulas, they’re also entered automatically into the new record in the list for you.

If your list is named Database, Excel automatically extends the range definition to include the new row or rows that you add to the list by using the Data Form dialog box. Note that this method works only if the list has the name Database; no other name works. Use the Formulas ➜ Defined Names ➜ Define Name command to name the range. If your list is in a table (created using Insert ➜ Tables ➜ Table), there’s no need to name the range. The table will be expanded automatically when you add new data.

You can use the Data Form dialog box for more than just data entry. You can edit existing data in the list, view data one record at a time, delete records, and display records that meet certain criteria.

The dialog box contains a number of additional buttons:

- **Delete**: Deletes the displayed record.
- **Restore**: Restores any information that you edited. You must click this button before you click the New button.
- **Find Prev**: Displays the previous record in the list. If you entered a criterion, this button displays the previous record that matches the criterion.
- **Find Next**: Displays the next record in the list. If you entered a criterion, this button displays the next record that matches the criterion.
- **Criteria**: Clears the fields and lets you enter a criterion on which to search for records. For example, to locate records that have a List Price less than $200,000, enter <200000 into the List Price field. Then you can use the Find Next and Find Prev buttons to display the qualifying records.
- **Close**: Closes the dialog box (and enters any data that you were entering).