

CREATE **Advanced** 45 MIN · UPDATED 2026-09-30

Build a complete dashboard from one prompt with Edit with Copilot.

Prompt Excel's Edit with Copilot to plan, build, check and iterate on a full dashboard with charts, graphs and PivotTables, unattended.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

A working dashboard in one session instead of the half-day it normally takes to wire up charts and pivots by hand.

Workflow Steps

Step 1: Clean the source data first

Excel

Edit with Copilot (Microsoft renamed it from "Agent Mode" in March 2026) works from whatever data it's given — fix inconsistent headers, blank cells and mixed data types first, and convert the range to an Excel Table (Ctrl+T) before prompting.

A proper Table gives Edit with Copilot clear column boundaries and named fields to build PivotTables and charts from, instead of it having to guess where your data actually starts and ends.

Step 2: Describe the dashboard you want in one prompt

Excel

Be specific about the metrics and breakdowns you need — Edit with Copilot plans the structure, builds the PivotTables and charts, checks its own output, and iterates without you babysitting each step.

PROMPT

Build a sales dashboard on a new tab with: a chart of revenue by month, a PivotTable of revenue by region and product line, and a KPI summary of total revenue, average deal size, and top 3 customers. Format it to be presentation-ready.

Step 3: Review what it built before presenting it

Excel

Check that every chart and pivot is actually pulling from the right source range — Edit with Copilot can misjudge which columns matter without explicit guidance.

Step 4: Ask for one iteration

Excel

If a chart type or layout isn't quite right, ask Copilot to adjust it rather than rebuilding manually — that's the point of the iterative agent loop.

✓ Check the work

- Click into each PivotTable and chart to confirm the source range is correct.
- Recompute one KPI by hand and compare it to what the dashboard shows.
- Check the dashboard still works if you refresh the underlying data — not just as a static snapshot.

Expected Outcome

A dashboard tab with linked PivotTables and charts built and formatted from a single prompt.

Want help rolling this out across your team? **Go to Liminals.Tech** ■