

≡ Hide menu

Customize the Excel Environment

Customize formula, proofing, and saving options

Enhancing workbooks and manage workbook properties

✓ Video: Customize workbooks
6 min

📖 Reading: Exercise: Customizing workbooks
10 min

📺 Video: Manage workbook properties
3 min

📖 Reading: Exercise: Managing workbook properties
10 min

📋 Practice Assignment: Knowledge check: Enhancing and managing workbooks
15 min

Exporting and sourcing data

Exercise: Customizing workbooks

Note: You can pass this course and all graded assessments without access to the downloadable version of Excel.

How to complete this exercise

To complete this exercise, you will need access to Microsoft 365 Excel.

Note: Keep in mind that if you are using free Office for the web or another version of the Microsoft 365 Excel application some features covered in this exercise may not be available.

Free Office for the web

If you do not have access to Microsoft 365 Excel, you can use Free Office for the web. This version of Office allows you to view and edit files in apps like Word, Excel, and PowerPoint. This free service is available to anyone with a Microsoft account.

Access Microsoft Account

[Log in to your Microsoft account.](#) Type the email, phone number, or Skype sign-in that you use for other services (Outlook, Office, etc.), then select Next. If you don't have a Microsoft account, you can select No account? Create one!

Let's get started!

Note: You will need both these files to complete this activity:

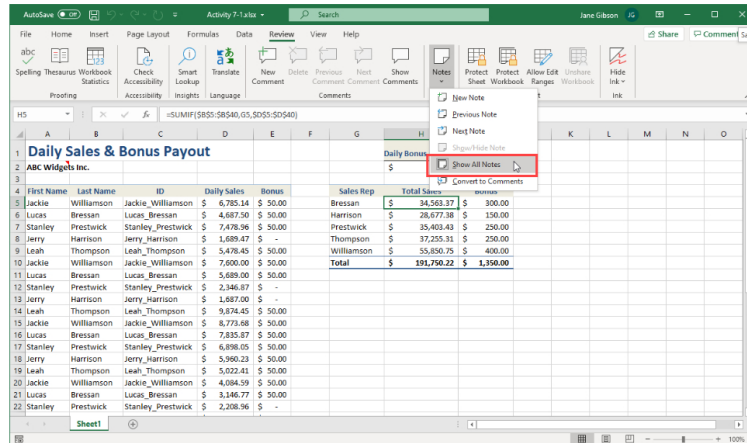
- [Exercise: Customizing workbooks](#)
- [Exercise: Customizing workbooks_image](#)

Your supervisor has sent you a workbook with notes indicating his requests.

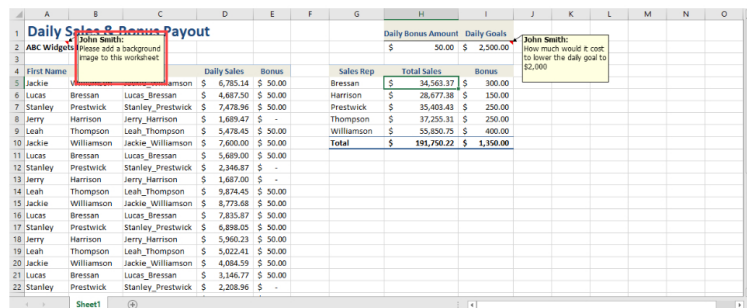
1. Click on the link below to open the Microsoft Excel exercise document you can use to complete this exercise.

[Exercise: Customizing workbooks](#)

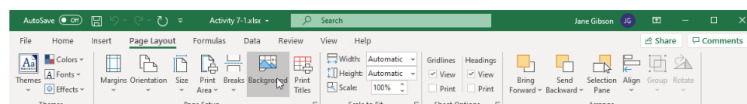
2. First, you would like to view all the notes on the worksheet. Click **Review** → **Notes** → **Show All Notes**:



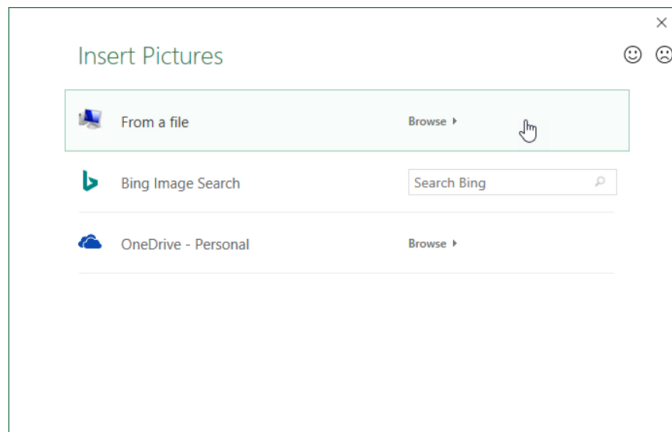
3. There are two notes from John Smith. The first, in cell A2, asks you to add a background to the worksheet:



4. Click **Page Layout** → **Background**:

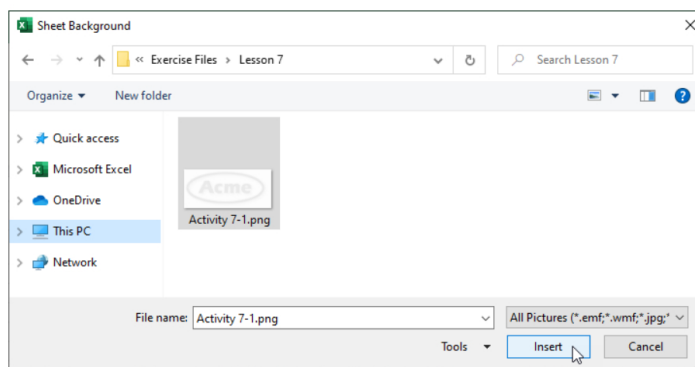


5. The Insert Pictures dialog box opens. Click **From a file**:

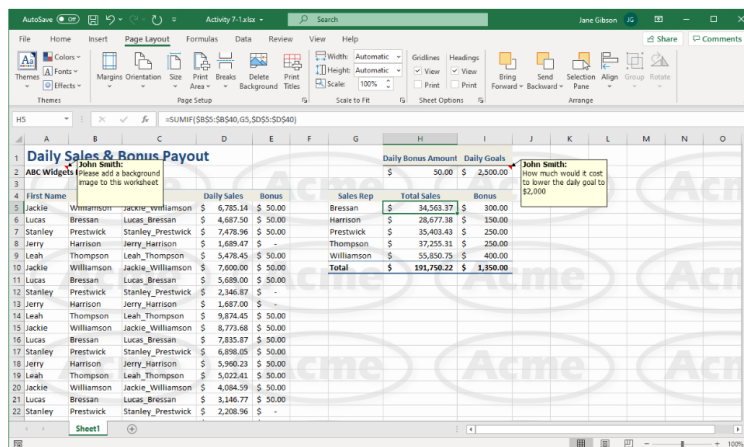


6. Browse to your exercise folder and select **Exercise_Customizing workbooks_image.png**, then click **Insert**:

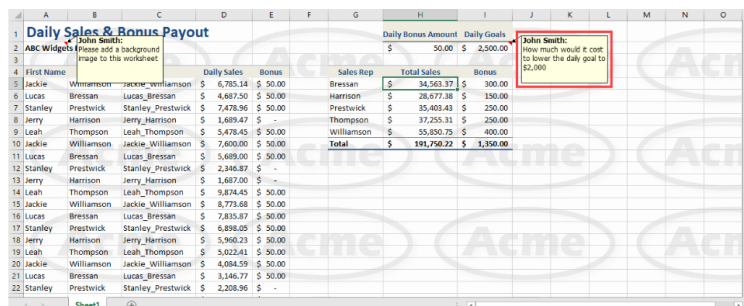
Note: In this activity we used Activity 7-1 as an example as seen below.



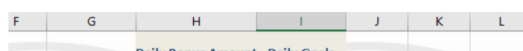
7. The background picture is added to the worksheet:



8. The second note asks how much it would cost to lower the daily sales goal to \$2,000:



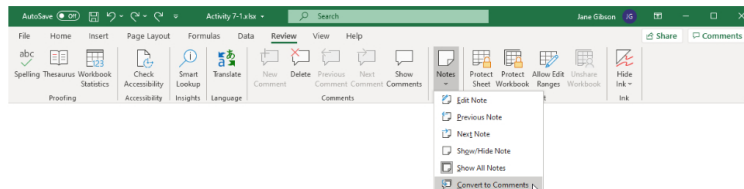
9. First note that the total of bonuses in cell I10 are \$1,350. Now click cell I2 and type **"2000"** to change the daily goals value, then press **Enter**:



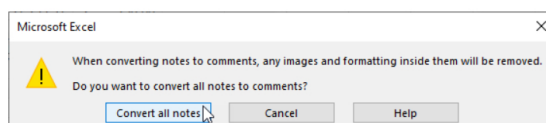
		\$ 50.00	\$ 2,000.00
Sales Rep	Total Sales	Bonus	
Bressan	\$ 34,563.37	\$ 300.00	
Harrison	\$ 28,677.38	\$ 200.00	
Prestwick	\$ 35,403.43	\$ 350.00	
Thompson	\$ 37,255.31	\$ 250.00	
Williamson	\$ 55,850.75	\$ 400.00	
Total	\$ 191,750.22	\$ 1,500.00	

John Smith:
How much would it cost to lower the daily goal to \$2,000

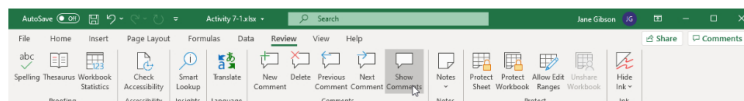
10. The calculated total bonuses in cell I10 is now \$1,500. It would cost \$150 to lower the daily sales goal. Press **Ctrl + Z** to undo the change made to cell I2, then click **Review** → **Notes** → **Convert to Comments** so you can add your comments to the notes:



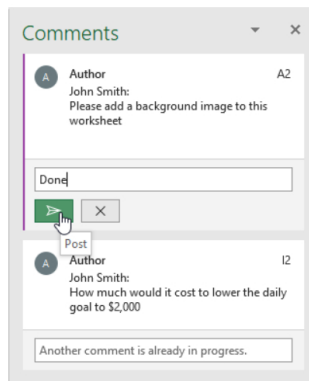
11. In the Excel alert dialog box, click **Convert all notes**:



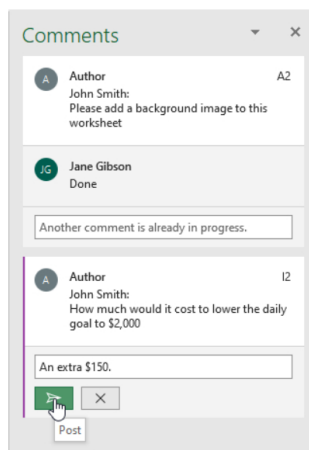
12. Now click **Review** → **Show Comments**:



13. In the Comments task pane, in the first comment, in the reply text box, type **"Done"**, then click **Post**:



14. In the second comment type **"An extra \$150."** Again, click **Post**:



15. **Close** the Comment task pane, then hover your cursor over cell **I2**. Note that only your comment has a date and time, as the previous comment was converted from a note:

	G	H	I	J	K	L	M	N
		Daily Bonus Amount		Daily Goals				
		\$	50.00	\$	2,500.00			
		Sales Rep		Total Sales		Bonus		
		Bressan	\$	34,563.37	\$	300.00		
		Harrison	\$	28,677.38	\$	150.00		
		Prestwick	\$	35,403.43	\$	250.00		
		Thompson	\$	37,255.31	\$	250.00		
		Williamson	\$	55,850.75	\$	400.00		
		Total	\$	191,750.22	\$	1,350.00		

Author

John Smith:

How much would it cost to lower the daily goal to \$2,000

12

...

Jane Gibson

An extra \$150.

7/29/2020 3:23 PM

Reply...

16. Save the current workbook as Activity 7-1 Complete and then close Microsoft 365 Excel to complete this exercise.

17. Now, you can check out an example of a completed document in the link below:

[Completed Customizing workbooks](#)

Mark as completed

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 Dislike
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