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Exercise: Apply conditional formatting

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!

To help find outliers and trends within a weekly sales and bonus payout worksheet, you need to apply some conditional formatting.

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

[Exercise: Apply Conditional Formatting](#)

1. To begin, open **Exercise: Apply Conditional Formatting** from your Exercise Files folder:

2. You first want to use color scales to highlight the sales associates that made above average in sales and those that were below average. Use your cursor to select cells D5:D14:

3. Next, click Home → Conditional Formatting → Color Scales. From the Color Scales gallery, click the first option:

First Name	Last Name	ID	Weekly Sales	Weekly Goal	Bonus
Jackie	Williamson	Jackie_Williamson	\$ 16,785.14	\$ 15,000.00	\$500.00
Lucas	Bressan	Lucas_Bressan	\$ 14,687.50	\$ 15,000.00	\$ -
Stanley	Prestwick	Stanley_Prestwick	\$ 13,478.96	\$ 15,000.00	\$ -
Jerry	Harrison	Jerry_Harrison	\$ 21,689.47	\$ 15,000.00	\$500.00
Leah	Thompson	Leah_Thompson	\$ 25,478.45	\$ 15,000.00	\$500.00
Robyn	Fletcher	Robyn_Fletcher	\$ 7,600.00	\$ 15,000.00	\$ -
Lisa	McCain	Lisa_McCain	\$ 5,689.00	\$ 15,000.00	\$ -
Steven	Stone	Steven_Stone	\$ 12,346.87	\$ 15,000.00	\$ -
Devon	Lawrence	Devon_Lawrence	\$ 11,687.00	\$ 15,000.00	\$ -
George	Jackson	George_Jackson	\$ 9,874.45	\$ 15,000.00	\$ -

4. You will immediately see that those sales associates who have made more than average in sales will be highlighted in green, while those who made below are highlighted in red. Those that were close to the average are a yellow or orange shade:

A	B	C	D	E	F	
Weekly Sales & Bonus Payout						
1						
4	First Name	Last Name	ID	Weekly Sales	Weekly Goal	Bonus
5	Jackie	Williamson	Jackie_Williamson	\$ 16,785.14	\$ 15,000.00	\$500.00
6	Lucas	Bressan	Lucas_Bressan	\$ 14,687.50	\$ 15,000.00	\$ -
7	Stanley	Prestwick	Stanley_Prestwick	\$ 13,478.96	\$ 15,000.00	\$ -
8	Jerry	Harrison	Jerry_Harrison	\$ 21,689.47	\$ 15,000.00	\$500.00
9	Leah	Thompson	Leah_Thompson	\$ 25,478.45	\$ 15,000.00	\$500.00
10	Robyn	Fletcher	Robyn_Fletcher	\$ 7,600.00	\$ 15,000.00	\$ -
11	Lisa	McCain	Lisa_McCain	\$ 5,689.00	\$ 15,000.00	\$ -
12	Steven	Stone	Steven_Stone	\$ 12,346.87	\$ 15,000.00	\$ -
13	Devon	Lawrence	Devon_Lawrence	\$ 11,687.00	\$ 15,000.00	\$ -
14	George	Jackson	George_Jackson	\$ 9,874.45	\$ 15,000.00	\$ -

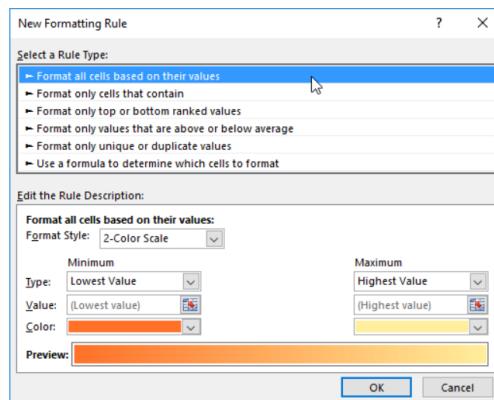
5. Next, you need to create a custom conditional formatting rule that will use an icon set to identify sales associates who met or exceeded their weekly goal, as well as those who met or exceeded the minimum sales goal requirement. Ensure that the D5:D14 range is selected:

A	B	C	D	E	F	
Weekly Sales & Bonus Payout						
1						
4	First Name	Last Name	ID	Weekly Sales	Weekly Goal	Bonus
5	Jackie	Williamson	Jackie_Williamson	\$ 16,785.14	\$ 15,000.00	\$500.00
6	Lucas	Bressan	Lucas_Bressan	\$ 14,687.50	\$ 15,000.00	\$ -
7	Stanley	Prestwick	Stanley_Prestwick	\$ 13,478.96	\$ 15,000.00	\$ -
8	Jerry	Harrison	Jerry_Harrison	\$ 21,689.47	\$ 15,000.00	\$500.00
9	Leah	Thompson	Leah_Thompson	\$ 25,478.45	\$ 15,000.00	\$500.00
10	Robyn	Fletcher	Robyn_Fletcher	\$ 7,600.00	\$ 15,000.00	\$ -
11	Lisa	McCain	Lisa_McCain	\$ 5,689.00	\$ 15,000.00	\$ -
12	Steven	Stone	Steven_Stone	\$ 12,346.87	\$ 15,000.00	\$ -
13	Devon	Lawrence	Devon_Lawrence	\$ 11,687.00	\$ 15,000.00	\$ -
14	George	Jackson	George_Jackson	\$ 9,874.45	\$ 15,000.00	\$ -

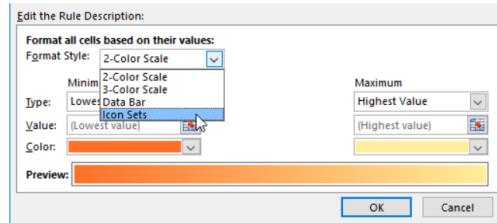
6. Next, click Home → Conditional Formatting → New Rule:

A	B	C	D	E	F	
Weekly Sales & Bonus Payout						
1						
4	First Name	Last Name	ID	Weekly Sales	Weekly Goal	Bonus
5	Jackie	Williamson	Jackie_Williamson	\$ 16,785.14	\$ 15,000.00	\$500.00
6	Lucas	Bressan	Lucas_Bressan	\$ 14,687.50	\$ 15,000.00	\$ -
7	Stanley	Prestwick	Stanley_Prestwick	\$ 13,478.96	\$ 15,000.00	\$ -
8	Jerry	Harrison	Jerry_Harrison	\$ 21,689.47	\$ 15,000.00	\$500.00
9	Leah	Thompson	Leah_Thompson	\$ 25,478.45	\$ 15,000.00	\$500.00
10	Robyn	Fletcher	Robyn_Fletcher	\$ 7,600.00	\$ 15,000.00	\$ -

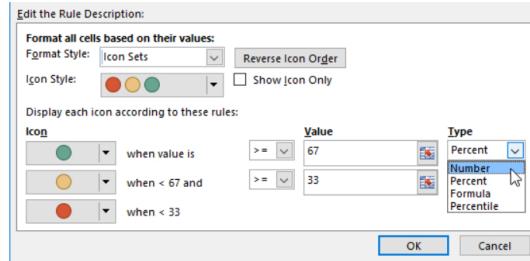
7. The New Formatting Rule dialog box will now be displayed. Click to select the “Format all cells based on their values” rule type:



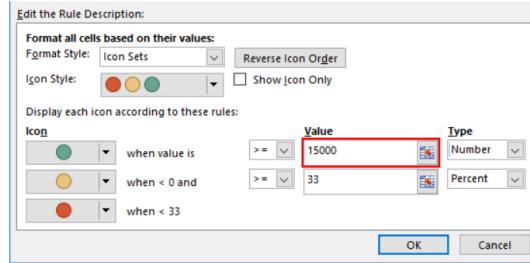
8. Within the Edit the Rule Description section, click the Format Style drop-down menu and then click the Icon Sets option:



9. The controls in the Edit the Rule Description section will change to incorporate controls that are relevant to icon sets. On the row that has the green icon, click the Type drop-down menu and then click the Number option:

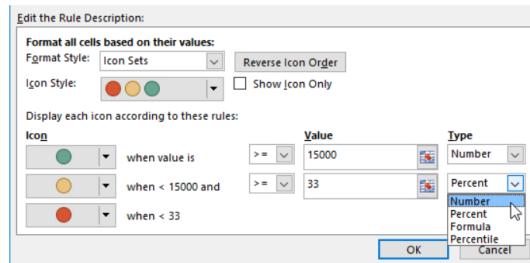


10. On the same row, inside the Value text box, type "15000" (the weekly goal):

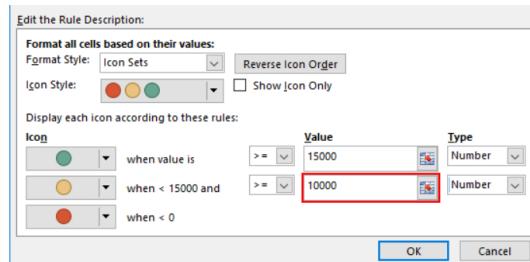


(Note that you could also reference a cell that contains the value that you need.)

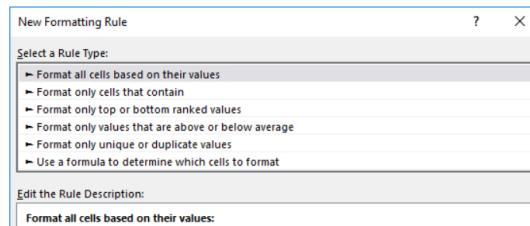
11. On the row that has the yellow dot icon, click the Type drop-down menu and then click the Number option:

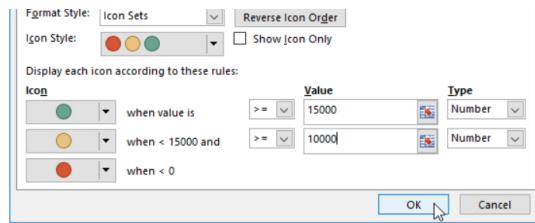


12. On the same row, type "10000" (the minimum weekly target) into the Value text box:



13. With the new custom conditional formatting rule configured, click OK:





14. The new rule will now be applied to the selected range of data. (You may need to resize the column so that there is room for the icon set.) In this case you will see sales associates who made or exceeded their goal, those who are slipping below the base goal, and those who have not met either goal type:

A	B	C	D	E	F	
1	Weekly Sales & Bonus Payout					
2						
3						
4	First Name	Last Name	ID	Weekly Sales	Weekly Goal	Bonus
5	Jackie	Williamson	Jackie_Williamson	\$16,785.14	\$ 15,000.00	\$500.00
6	Lucas	Bressan	Lucas_Bressan	\$14,687.50	\$ 15,000.00	\$ -
7	Stanley	Prestwick	Stanley_Prestwick	\$13,478.96	\$ 15,000.00	\$ -
8	Jerry	Harrison	Jerry_Harrison	\$21,689.47	\$ 15,000.00	\$500.00
9	Leah	Thompson	Leah_Thompson	\$25,478.45	\$ 15,000.00	\$500.00
10	Robyn	Fletcher	Robyn_Fletcher	\$ 7,600.00	\$ 15,000.00	\$ -
11	Lisa	McCain	Lisa_McCain	\$ 5,689.00	\$ 15,000.00	\$ -
12	Steven	Stone	Steven_Stone	\$12,346.87	\$ 15,000.00	\$ -
13	Devon	Lawrence	Devon_Lawrence	\$11,687.00	\$ 15,000.00	\$ -
14	George	Jackson	George_Jackson	\$ 9,874.45	\$ 15,000.00	\$ -

15. Save your work as Activity 1-3 Complete and then close Microsoft Excel 2016.

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

[Completed exercise: Apply Conditional Formatting](#)

[Mark as completed](#)

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