

Step-by-Step Beginner's Guide for Excel Formatting Tasks

1. Format the Table

Instructions:

1. Highlight all the data (columns containing actual order information).
2. Go to the **Home** tab and click **Format as Table** in the Styles group.
3. Choose a table style from the dropdown menu (e.g., light or medium styles).
4. In the dialog box, ensure the checkbox for **My table has headers** is selected, and click **OK**.

2. Use Correct Number Format

Instructions:

1. Highlight numeric columns (e.g., Number of Items, Subtotal, Tax Charged, Total Charged).
2. Go to the **Home** tab.
3. In the **Number** group, choose the correct format:
 - For currency: Select **Currency** (\$ symbol).
 - For whole numbers: Select **Number** (without decimals).

3. Center the Data in the "Number of Items" Column

Instructions:

1. Highlight the "Number of Items" column.
2. Go to the **Home** tab and click the **Center Alignment** button in the Alignment group.

4. Add a Clear Header Row

Instructions:

1. Ensure your table's first row contains descriptive titles for each column (e.g., Order Date, Order ID).
2. Highlight the header row.
3. Apply bold formatting using **Ctrl+B** or the **Bold** button in the Home tab.

5. Add a Table Title

Instructions:

1. Click a cell above your table.
2. Type the title (e.g., "Order Summary Report").
3. Merge and center the title across the table width:
 - Highlight the title cell and adjacent blank cells.
 - Click **Merge & Center** in the Home tab.
4. Apply bold formatting and increase the font size.

6. Add a Table Border

Instructions:

1. Highlight the entire table.
2. Go to the **Home** tab and click the **Borders** dropdown in the Font group.
3. Select **All Borders**.

7. Color Code Headers and Totals

Instructions:

1. Highlight the header row.
2. Apply a fill color using the **Fill Color** tool in the Font group (e.g., light blue).
3. Add a total row to the table (see step 12) and apply a contrasting fill color (e.g., light gray).

8. Perform Quality Control (QC) Checks

Instructions:

1. Look for errors or anomalies in the data (e.g., missing values, negative numbers in amounts, incorrect dates).
2. Add a new column labeled "QC Status".
3. Use formulas or manual checks to flag issues (e.g., =IF(A2="", "Fail", "Pass")).

9. Add QC Columns

Instructions:

1. Add a column labeled "Pass/Fail" next to the existing columns.
2. Use formulas for checks, such as:
 - Example: =IF([@Subtotal] <= 0, "Fail", "Pass").
3. Adjust the logic based on the QC requirements.

10. Add Additional Columns

- **Average Cost Per Order:** Divide the "Total Charged" by the "Number of Items" for each row using the formula: $=[@\text{Total Charged}]/[@\text{Number of Items}]$.
- **Average Cost Per Item:** Add a new column and use the formula: $=[@\text{Subtotal}]/[@\text{Number of Items}]$.
- **Tax Rate:** Calculate tax rate using: $=[@\text{Tax Charged}]/[@\text{Subtotal}]$.

11. Add a Total Row

Instructions:

1. Click anywhere in the table.
2. Go to the **Table Design** tab and check the **Total Row** box.
3. The total row will appear at the bottom of the table. Customize it:
 - Use the dropdowns in the total row cells to select functions (e.g., Sum, Average).

12. Create a Report on Number of Orders & Items per Order Status

Instructions:

1. Insert a PivotTable:
 - Highlight the table.
 - Go to the **Insert** tab and click **PivotTable**.
 - Place it on a new worksheet.
2. Drag "Order Status" to Rows and "Number of Items" to Values.
3. Add "Order ID" to Values (change the calculation to **Count**).
4. Rename the report for clarity.

13. Create a Report on Average Cost Per Order per Month

Instructions:

1. Insert another PivotTable based on the table.
2. Drag "Order Date" to Rows and group by **Months**.
3. Drag "Average Cost Per Order" to Values.
4. Format the table for better readability.

14. Create a Graph Based on Relevant Data

Instructions:

1. Highlight the data you want to visualize (e.g., Order Status vs. Number of Orders).
2. Go to the **Insert** tab and select a chart type (e.g., Bar Chart, Line Graph).
3. Customize the chart:

- Add titles, adjust colors, and label axes.
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Tips for Beginners

- Save your work frequently.
- Use Excel's **Help** feature or online tutorials if you get stuck.
- Experiment with different formatting options to improve table aesthetics.
- Double-check formulas and data for accuracy.

Common Excel Formulas

- **SUM**: Adds together selected cells
- **AVERAGE**: Calculates the average of selected cells
- **COUNT**: Counts the number of selected cells
- **CONCATENATE**: Combines text from different cells into one cell
- **COUNTIF**: Counts the number of cells in a range that meet a given criteria
- **COUNTBLANK**: Counts the number of blank cells in a range
- **IF**: An if function
- **VLOOKUP**: A lookup function
- **HLOOKUP**: A lookup function