

Retail Sales Excel Beginner Tasks – IF, SWITCH, VLOOKUP, XLOOKUP, Data Validation

Task 1 – IF Function (Single Condition)

Check if each sales transaction is above £500. If yes, label it as “High Value”, otherwise label it as “Regular”.

Task 2 – IF Function (Multiple Conditions)

Classify sales into categories:

- If sales > £1000 → “Premium”
- If sales between £500–1000 → “Standard”
- Otherwise → “Basic”

Task 3 – SWITCH Function

Convert each region name into a zone code:

- North → “Zone 1”
- South → “Zone 2”
- East → “Zone 3”
- West → “Zone 4”

Task 4 – VLOOKUP (Find Product Price)

Using a Product Price List (create a small table with product names and prices), look up the price of each product in the sales dataset.

Task 5 – VLOOKUP (Find Customer Region)

Using a Customer Info Table (customer name + region), bring the region information into the main sales dataset.

Task 6 – XLOOKUP (Find Customer Email)

Create a small Customer Contact List (customer name + email). Use XLOOKUP to fetch the email address for each customer in the sales dataset.

Task 7 – XLOOKUP (Find Salesperson)

Make a Salesperson Assignment Table (region + salesperson). Use XLOOKUP to find which salesperson is responsible for each transaction based on the region.

Task 8 – Data Validation (Dropdown for Product Selection)

Restrict product entries to a dropdown list showing only the valid product names.

Task 9 – Data Validation (Dropdown for Region)

Restrict region entries to only these values: North, South, East, West.

Task 10 – Data Validation (Custom Rule)

Ensure the Sales Amount column only accepts values greater than zero.