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

Task 1 – IF Function (Single Condition)

Goal: Label transactions as "High Value" or "Regular."

1. Go to the **Sales Amount** column.

2. Insert a new column called **Transaction Type**.

3. Use the formula:

4. =IF([Sales_Amount_Cell]>500,"High Value","Regular")

5. Fill down to apply to all rows.

Task 2 – IF Function (Multiple Conditions)

Goal: Categorise transactions as Premium, Standard, or Basic.

1. Insert a new column called **Sales Category**.

2. Use nested IFs:

3. =IF([Sales_Amount_Cell]>1000,"Premium",IF([Sales_Amount_Cell]>=500,"Standard","Basic"))

4. Fill down for the whole dataset.

Task 3 – SWITCH Function

Goal: Convert region names into zone codes.

1. Insert a new column called **Zone**.

2. Use the SWITCH function:

3. =SWITCH([Region_Cell],"North","Zone 1","South","Zone 2","East","Zone 3","West","Zone 4")

4. Fill down.

Task 4 – VLOOKUP (Find Product Price)

Goal: Add product prices from a lookup table.

1. Create a small **Product Price Table** with **Product Name** and **Price**.

2. Insert a new column in the sales dataset called **Product Price**.

3. Use VLOOKUP:

4. =VLOOKUP([Product_Cell], [Price_Table_Range],2,FALSE)

5. Fill down.

Task 5 – VLOOKUP (Find Customer Region)

Goal: Pull in customer region from a separate table.

1. Create a **Customer Info Table** with **Customer Name** and **Region**.

2. Insert a new column in the dataset called **Customer Region**.

3. Use VLOOKUP:

4. =VLOOKUP([Customer_Name_Cell], [Customer_Table_Range],2,FALSE)

5. Fill down.

Task 6 – XLOOKUP (Find Customer Email)

Goal: Add email addresses to the dataset.

1. Create a **Customer Contact Table** with **Customer Name** and **Email**.

2. Insert a new column called **Customer Email**.

3. Use XLOOKUP:

4. =XLOOKUP([Customer_Name_Cell],[Customer_List_Range],[Email_Range])

5. Fill down.

Task 7 – XLOOKUP (Find Salesperson)

Goal: Identify the salesperson by region.

1. Create a **Salesperson Assignment Table** with **Region** and **Salesperson**.

2. Insert a new column called **Salesperson**.

3. Use XLOOKUP:

4. =XLOOKUP([Region_Cell],[Region_List_Range],[Salesperson_Range])

5. Fill down.

Task 8 – Data Validation (Dropdown for Product Selection)

Goal: Restrict product entries.

1. Highlight the **Product column**.

2. Go to **Data > Data Validation**.

3. Select **List** and choose the range where product names are stored.

4. Now only valid product names can be entered.

Task 9 – Data Validation (Dropdown for Region)

Goal: Restrict region entries to North, South, East, West.

1. Highlight the **Region column**.

2. Go to **Data > Data Validation**.

3. Select **List** and type:

4. North,South,East,West

5. Now entries are limited to these options.

Task 10 – Data Validation (Custom Rule)

Goal: Ensure sales values are always positive.

1. Highlight the **Sales Amount column**.

2. Go to **Data > Data Validation**.

3. Select **Custom**, and enter this rule:

4. =A2>0

(replace A2 with the first cell in your Sales Amount column).

5. Now negative or zero entries will be rejected.