XLOOKUP Practice

Learner Guide

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How to Use This Workbook

Activity
Alongside this icon you'll find details of the group/individual activity or a point for everyone to discuss.

Useful Tool
This icon indicates a technique that will help you put what you learn into practice.

Important Idea or Concept
Generally, this icon is used to draw your attention to ideas that you need to understand by this point in the course. Let your trainer know if you do not understand or see the relevance of this idea or concept.

Helpful Hint
This icon guides you to tips or hints that will help you avoid the standard pitfalls that await the unwary practitioner or to show you how you might increase your effectiveness or efficiency in practising what you have learnt.

Key Point
This icon is used to indicate something that practitioners in this field should know. It's likely to be one of the major things to remember from the course, so check you do understand these key points.

Reference Material
When we have only touched briefly on a topic this icon highlights where to look for additional information on the subject. It may also be used to draw your attention to International or National Standards or Web addresses that have interesting collections of information.

Definition
Where a word with a very specific definition (or one that could be described as jargon) is introduced this will highlight that a definition is provided. (These words will also be found in the Glossary at the back of the workbook.)

Warning
This icon is used to point out important information that may affect you and your use of the product or service in question.

Introduction to XLOOKUP

Welcome to the XLOOKUP practice exercise. XLOOKUP is an alternative lookup function to VLOOKUP or HLOOKUP. It allows you to search for approximate matches, handle errors more efficiently, and The XLOOKUP function can look up both vertically and horizontally.

This guide consists of a series of practice questions on XLOOKUP using the superstore dataset. The superstore data used in the "Basic Filtering" activity.

Ensure you have completed the **Lookup and reference functions section** located in the **Guide to Microsoft Excel.pdf**. The section includes topics on; VLOOKUP, MATCH, INDEX and XLOOKUP functions. Once all four topics have been completed, you understand the relevance of each function.

Key point
XLOOKUP is only available in Excel 2021 and 365

Objectives

The XLOOKUP function in Excel can serve various objectives when working with the SUPERSTORE dataset. Here are some objectives for utilizing XLOOKUP on the SUPERSTORE dataset:

- Retrieve, analyze, and manipulate data based on various criteria.

- Improving data handling, analysis, and decision-making processes.

- Extract specific information such as sales amounts, customer names, based on unique identifiers like Order IDs.

XLOOKUP Practice

You will use XLOOKUP to achieve the following within the superstore dataset, where the relevant information is stored.

- Retrieve information such as sale amounts and customer names based on unique identifiers such as Order IDS, Product IDS or Customer IDs.

- Handling error effectively by providing an option to specify a value to return if a match is not found.

- Dynamic lookup using multiple criteria and conditions.

Information retrieval

Independent activity:
XLOOKUP to retrieve specific information

1. **Find Sales Amount for a Specific Order ID**

    - What is the Sales amount for the Order ID "CA-2016-152156"?

2. **Retrieve Customer Name for a Given Order ID**

    - Who is the customer associated with the Order ID "CA-2015-156108"?

3. **Find Shipping Mode for a Specific Order ID**

    - What shipping mode was used for the Order ID "CA-2017-138688"?

4. **Locate Order ID by Product Name**

    - What is the Order ID for the product named "Canon imageCLASS 2200 Advanced Copier"?

5. **Retrieve Discount Amount for a Specific Order ID**

    - What was the discount amount for the Order ID "CA-2018-114412"?

6. **Find the Region for a Given Order ID**

    - To which region does the Order ID "CA-2017-118989" belong?

7. **Retrieve Ship Date for a Specific Order ID**

    - What was the ship date for the Order ID "CA-2016-161018"?

Handling error

Independent activity:
XLOOKUP to handle errors

1. **Finding Sales Amount for a Specific Order ID with Error Handling**

   - Retrieve the sales amount for the Order ID "CA-2016-152156", and if the Order ID is not found, display a custom message.

2. **Handling Error with Approximate Match**

   - Look up the nearest smaller sales amount to 2500. If an exact match isn't found, display an informative message.

3. **Reverse Lookup with Error Handling**

   - Find the Order ID based on a known Sales Amount. If the Sales Amount isn't found, display a custom message.

Dynamic Lookup using multiple criteria

1. **Retrieve Sales Amount for a specific Product Name in a chosen Region.**

   - Fetch the sales amount for a particular product Name in a dynamically selected Region.

2. **Finding Order ID for a Specific Customer in a Given Segment**

   - Retrieve the Order ID for a particular Customer Name in a dynamically chosen Segment.

3. **Retrieve Profit for a Specific Category and State**

   - Find the Profit for a selected Category in a chosen State.