

Lesson 3-15: Create a template

- 1 Open *First Quarter Sales and Bonus* from your sample files folder.

note

This worksheet looks flashy!

If you are wondering how to make your own worksheets look as flashy as this one you'll only need a little more patience.

You'll learn every skill you need to make your worksheets look as good, and even a lot better than this one in the next session: *Session Four: Making Your Worksheets Look Professional*.

| | A | B | C | D | E |
|----|-------------------------------|-----------|------------|----------|-------------------|
| 1 | First quarter sales and bonus | | | | |
| 2 | | | | | |
| 3 | Sales | | | | |
| 4 | | | | | |
| 5 | First Name | Last Name | Sales | Target | Over Target Sales |
| 6 | Andrew | Fuller | 7,639.30 | 5,000 | 2,639.30 |
| 7 | Anne | Dodsworth | 2,979.30 | 5,000 | - 2,020.70 |
| 8 | Janet | Leverling | 29,658.60 | 5,000 | 24,658.60 |
| 9 | Laura | Callahan | 19,271.60 | 5,000 | 14,271.60 |
| 10 | Margaret | Peacock | 44,795.20 | 5,000 | 39,795.20 |
| 11 | Michael | Suyama | 4,109.80 | 5,000 | - 890.20 |
| 12 | Nancy | Davolio | 15,330.10 | 5,000 | 10,330.10 |
| 13 | Robert | King | 21,461.60 | 5,000 | 16,461.60 |
| 14 | Steven | Buchanan | 2,634.40 | 5,000 | - 2,365.60 |
| 15 | | Total: | 147,879.90 | | |
| 16 | | | | | |
| 17 | Bonus | | | | |
| 18 | | | | | |
| 19 | First Name | Last Name | Salary | Bonus | Total |
| 20 | Andrew | Fuller | 2,500 | 131.97 | 2,631.97 |
| 21 | Anne | Dodsworth | 2,000 | - | 2,000.00 |
| 22 | Janet | Leverling | 2,600 | 1,232.93 | 3,832.93 |
| 23 | Laura | Callahan | 2,800 | 713.58 | 3,513.58 |
| 24 | Margaret | Peacock | 3,000 | 1,989.76 | 4,989.76 |
| 25 | Michael | Suyama | 1,800 | - | 1,800.00 |
| 26 | Nancy | Davolio | 4,500 | 516.51 | 5,016.51 |
| 27 | Robert | King | 2,000 | 823.08 | 2,823.08 |
| 28 | Steven | Buchanan | 3,000 | - | 3,000.00 |
| 29 | | Total: | 24,200 | 5,407.82 | 29,607.82 |

This is exactly the type of workbook you'd probably want to convert into a template. Only the data in cells C6:D14 will change each quarter.

Every quarter you could simply open last quarter's workbook, save it with a new name and then delete the old values in cells C6:D14. But you'd have to do that every quarter and then, one day, you might forget the *save it with a new name* step and end up overwriting the old file.

A much more efficient solution would be to save a copy of the workbook, with blank values in cells C6:D14, as a template.

- 2 Delete the contents of cells C6:D14.

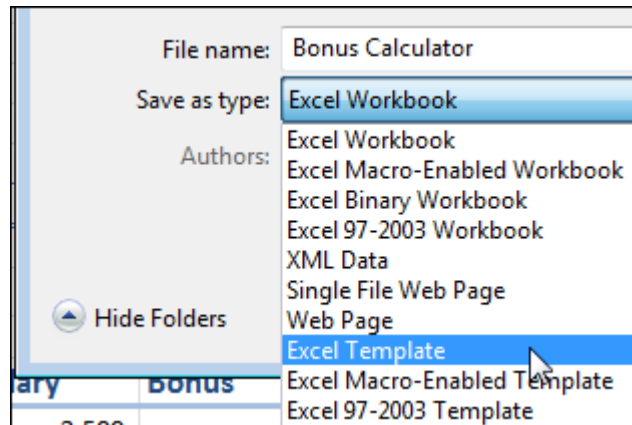
This is the data that changes every quarter. Deleting it will provide an empty template, ready to be populated with each quarter's figures.

- 3 Replace the text in cell A1 with the words: *Bonus Calculator*.

This is a more generic title that can be used for any quarter.

First Quarter Sales and Bonus

- 4 Save your work as: *Bonus Calculator*.
- 5 Save the workbook again, this time as a template.
 1. Click: File→Save As→Computer→Browse.
 2. Click the drop down list arrow labeled *Save as Type* at the bottom of the *Save As* dialog.



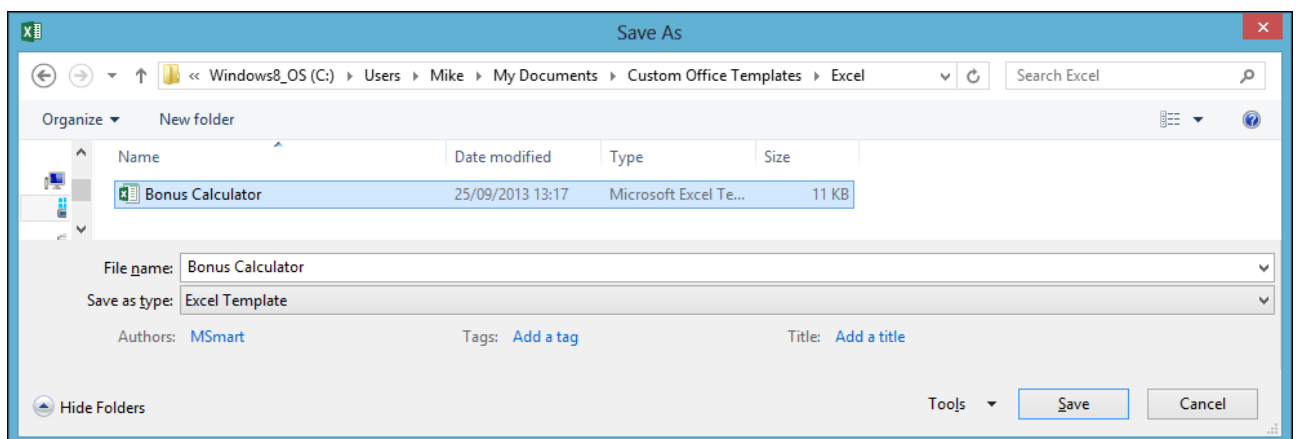
3. The best choice for this workbook is: *Excel Template*.

If this template needed to be used by users with very old versions of Excel you'd choose *Excel 97-2003* template.

If the workbook contained macros (working with macros is an Expert level skill covered fully in the *Expert Skills* book in this series) you'd need to choose *Excel Macro-Enabled Template*.

4. Click the *Save* button to save the template to the default template folder that you created in: *Lesson 3-14: Understand templates and set the default custom template folder*.

The existing name: *Bonus Calculator* is fine.



- 6 Close Excel.