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	Α	В	С	D	E
1	First quarte	er sales and	bonus		
2					
3	Sales				
4					
					Over Target
5	First Name	Last Name	Sales	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.

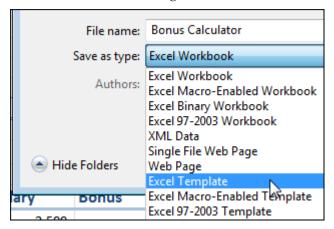
Replace the text in cell A1 with the words: Bonus Calculator.

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

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- 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.



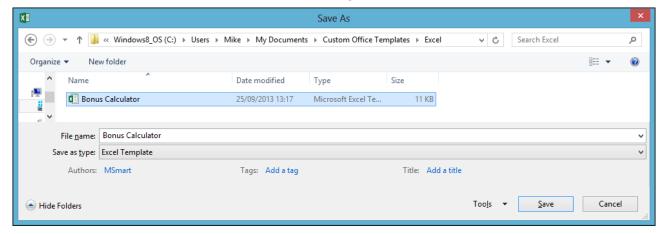
3. The best choice for this workbook is: *Excel Template*.

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.

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