

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.

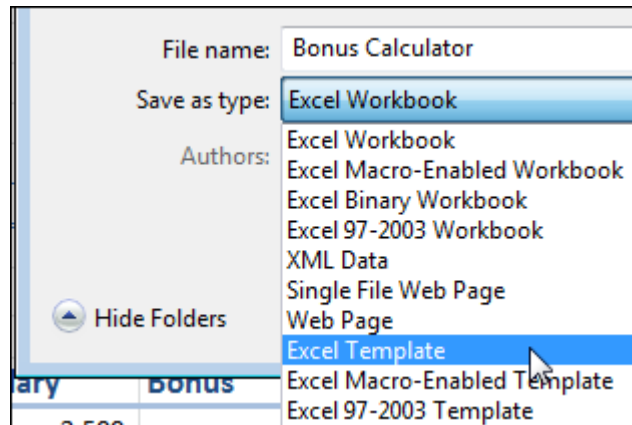
This is the data that changes every quarter. Deleting it will provide an empty template, ready to be populated with each quarter's figures.

- 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.



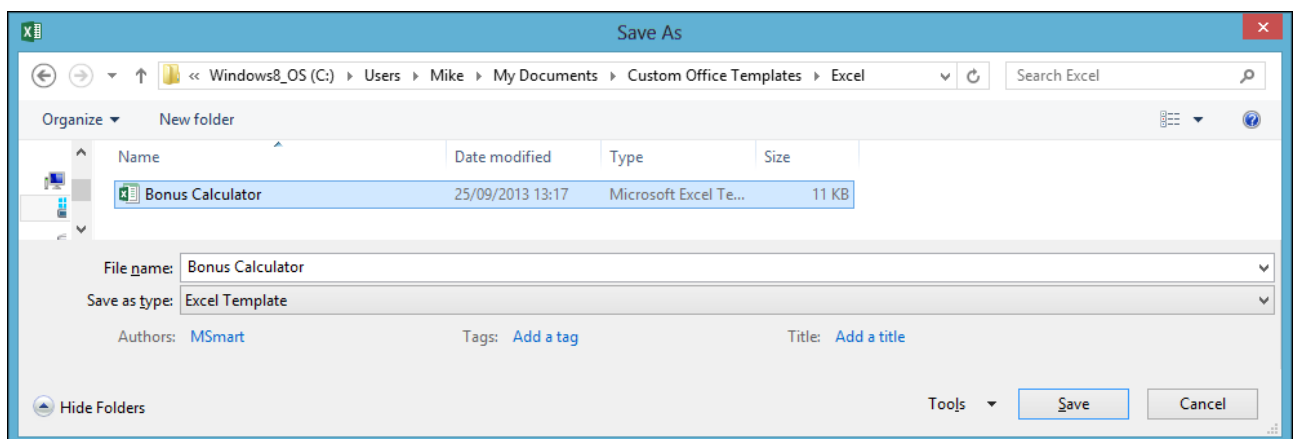
3. The best choice for this workbook is: *Excel Template*.

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.