

Microsoft Excel 2010

Level 2



SET-UP AND INFORMATION

Sample Files

Please copy the sample files into the **My Documents** folder.

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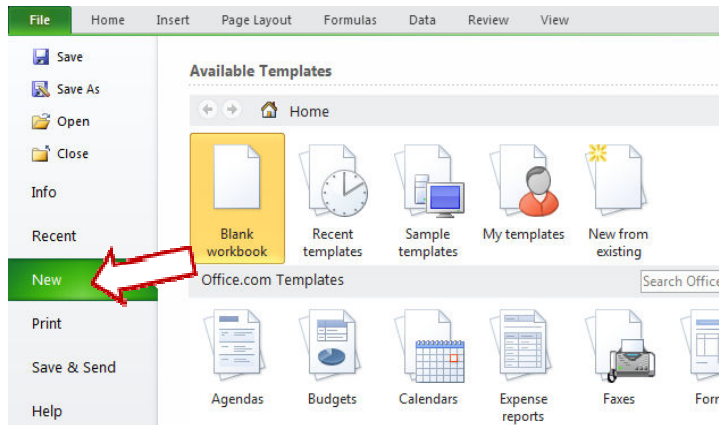
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Templates

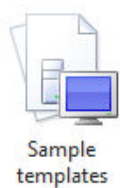
For this chapter, you need to open the workbook called: **Client Invoice**

Excel Templates

- Microsoft Excel has a whole range of built in, as well as online templates.
- On the **Ribbon**, select **New** on the **File** tab to find a selection of templates.



- Under **Available Templates**, click on the **Sample templates** icon.



- We will study the **Loan Amortization** template. **Double-click** on the icon to open it.
- Examine the workbook. In terms of loans, **amortization** is the process of paying down the loan by making payments which include both principal and interest.
- Enter fictional values into the cells with the light orange background fill to see the results of the calculations in the worksheet.

1	Loan Amortization Schedule	
3		
4		Enter values
5	Loan amount	
6	Annual interest rate	
7	Loan period in years	
8	Number of payments per year	
9	Start date of loan	
10	Optional extra payments	
11		

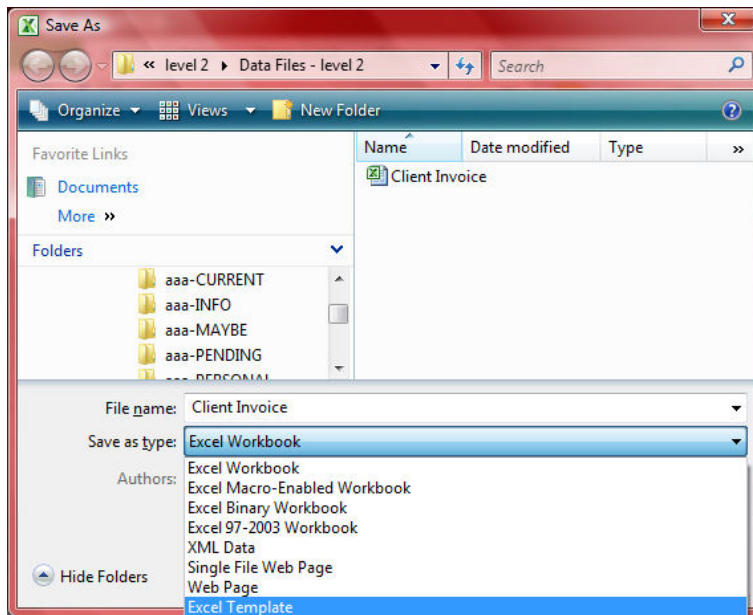
- Saving a template will not override the original template. Excel will treat it as a new workbook and the **Save As** dialog box will appear when you click on the **Save** icon.

Custom Templates

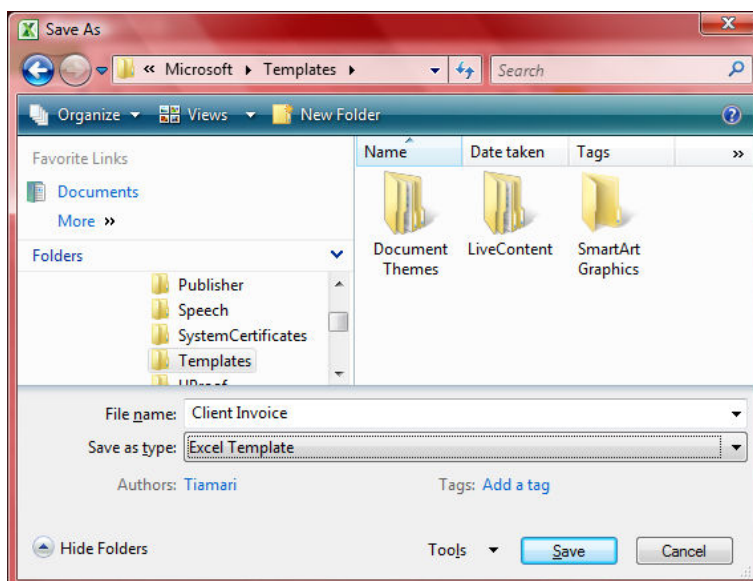
For this section, use the sheet named **001**

Creating a Custom Template

- Custom templates can be created by saving a workbook as an Excel template.
- The workbook **Client Invoice** contains a blank invoice that we want to save as a template.
- Once the workbook has been opened, select **Save As** on the **File** tab. The **Save As** dialog box will be displayed. In the **Save as type** drop down list, select **Excel Template**.



- The save location will automatically change to a folder called **Templates**. Click on the **Save** button to save the template.



Opening a Custom Template

- To use a custom template, select **New** on the **File** tab. Under **Available Templates**, click on the **My Templates** icon and select the template that was created.



Editing a Custom Template

Any changes that you make to the template file will only affect new workbooks that are created by using the edited template. Any workbooks that were previously created based on the unedited template will remain unaffected.

Simple Way

- The easy way to edit a custom template is to simply **Open** it from the **My Templates** list.
- Then edit it and save it again as a template, either over writing the original template file or saving it with a new name.

Alternative Method

- Alternatively, use the following method. (This method could be tricky as it involves browsing to you Microsoft template files and the path may vary from one computer to another)
- Select **Open** on the **File** tab.
- On the **File Type** drop-down list, select **Templates**, and browse to the templates folder, which is usually located in

C:\Users\User name\AppData\Roaming\Microsoft\Templates

Do!

Task 1

1. Open the Excel Sample Template called **Personal Monthly Budget**.
2. Make a few adjustments to suit your personal needs.
3. Save the edited file as a Template in **My Templates**. Use the file name **My Edited Budget**.



This document includes only the first section of the course. For enquiries about purchasing the full course, kindly contact Tiamari Taljaard.

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