# STUDYDADDY

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**Unit 2: Assignment**

**Scenario**:
You are a part-time assistant in the accounting department at Aficionado Guitar Parts, a Chicago-based supplier of custom guitar parts. You have been asked to use Excel to create formulas and functions in order to generate a report that summarizes the monthly accounts receivable balance (see below). A chart of the balances also is desired. The customer data in Table 1 (below) is available for test purposes.

**Instructions Part1:**

### Aficionado Guitar Parts
#### Monthy Accounts Receivable Balance Report

| Customer | Beginning Balance | | Credits | | Payments | | Purchases | | Service Charge | | New Balance |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Cervantes, Katriel | $ | 803.01 | $ | 56.92 | $ | 277.02 | $ | 207.94 | $ | 15.24 | $ 692.25 |
| Cummings, Trenton | | 285.05 | | 87.41 | | 182.11 | | 218.22 | | 0.50 | 234.25 |
| Danielsson, Oliver | | 411.45 | | 79.33 | | 180.09 | | 364.02 | | 4.94 | 520.99 |
| Kalinowski, Jadwiga | | 438.37 | | 60.90 | | 331.10 | | 190.39 | | 1.51 | 238.27 |
| Lanctot, Royce | | 378.81 | | 48.55 | | 126.15 | | 211.38 | | 6.63 | 422.12 |
| Raglow, Dora | | 710.99 | | 55.62 | | 231.37 | | 274.71 | | 13.78 | 712.49 |
| Tuan, Lin | | 318.86 | | 85.01 | | 129.67 | | 332.89 | | 3.39 | 440.46 |
| Totals | $ | 3,346.54 | $ | 473.74 | $ | 1,457.51 | $ | 1,799.55 | $ | 46.00 | $ 3,260.84 |
| | | | | | | | | | | | |
| Highest | $ | 803.01 | $ | 87.41 | $ | 331.10 | $ | 364.02 | $ | 15.24 | $ 712.49 |
| Lowest | $ | 285.05 | $ | 48.55 | $ | 126.15 | $ | 190.39 | $ | 0.50 | $ 234.25 |
| Average | $ | 478.08 | $ | 67.68 | $ | 208.22 | $ | 257.08 | $ | 6.57 | $ 465.83 |

**Perform the following tasks:**

Download the **Unit 2 data file** from Doc Sharing and use it for this assignment.
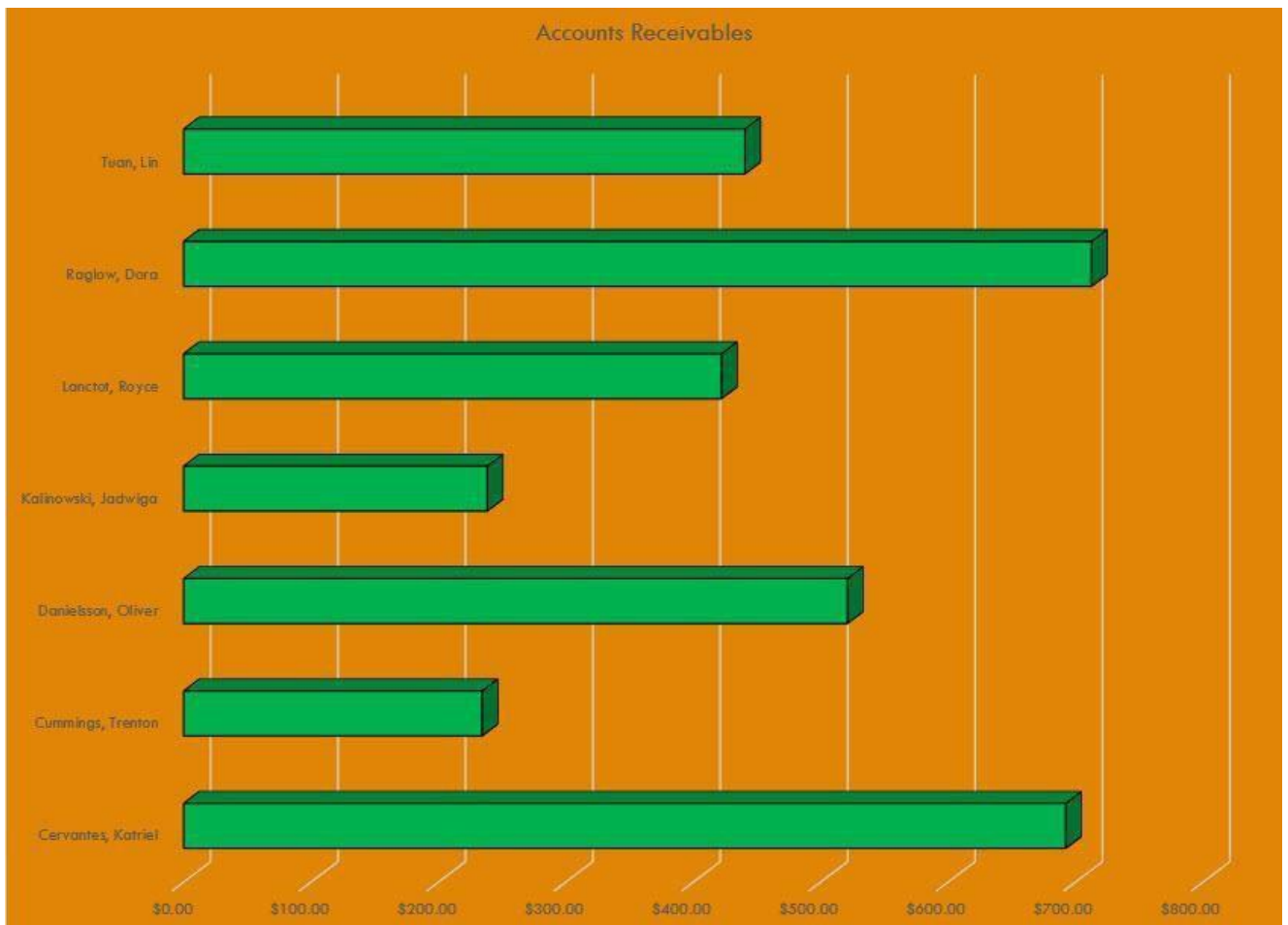
1. Format the worksheet as described in the following instructions.
    a. Change the theme of the worksheet to a theme of your choice.
    b. Apply the Title cell style to cells A1 and A2.
    c. Change the font size in cell A1 to 28 points.
    d. Merge and center the worksheet title and subtitle across columns A through G.
    e. Change the background color of cells A1 and A2 to the Red standard color.
    f. Change the font color of cells A1 and A2 to the White theme color.
    g. Draw a thick box border around the range A1:A2.
2. Apply the following changes:
    a. Change the width of column A to 20.00 points.
    b. Change the widths of columns B through G to 12.00 points.
    c. Change the height of row 1 and 2 to 30 .00 points.
    d. Change the height of row 3 to 36.00 points.
    e. Change the height of row 12 to 30.00 points.

3. Apply the following changes:

a. Format the column titles in row 3 and row titles in the range A11: A14, as shown in the finished worksheet above (Hint: Use Alt+Enter to wrap text).
b. Center and Middle align the column titles in the range A3: G3.
c. Apply the Heading 3 cell style to the range A3: G3.
d. Apply the Currency and Total cell styles to the range A11: G11.
e. Bold the titles in the range A12: A14.
f. Change the font size in the range A3: G14 to 12 points.

4. Build the following formula(s) to determine the service charge in column F and the new balance in column G for the first customer. Copy the two formulas down through the remaining customers.

   a. Service Charge (cell F4) = 3.25% * (Beginning Balance – Payments – Credits)
   b. New Balance (G4) = Beginning Balance + Purchases – Credits – Payments + Service Charge

5. Determine the totals in row 11 using the SUM Function.

6. Determine the maximum, minimum, and average values in cells B12:B14 for the range B4:B10, and then copy the range B12:B14 to C12:G14.

7. Format the numbers as follows:
   a. a. Assign the Currency style to the cells containing numeric data in the ranges B4: G4 and B11:G14.
   b. b. Assign a Comma style to the range B5:G10.

8. Use conditional formatting to change the formatting to Light red Fill with Dark Red Text in any cell in the range F4: F10 that contains a value greater than 10.

9. Change the following:
   a. Change the worksheet name from Sheet1 to Accounts Receivable and the sheet tab color to the Red standard color.

b. Change the worksheet header with your name (Right Side), course number (Left Side, and footer with the date (Left Side) and page number (Right Side). (Use Footer tools do not type).

10. Spell check the worksheet. Preview the worksheet in landscape orientation. Save the workbook using the file name, Unit_2_Assignment _YourName.

**Instructions Part2:**

In this part of the exercise, you will create a 3-D Bar chart on a new Chart sheet in the workbook (Chart Figure below). If necessary, use Excel Help to obtain information on

inserting a chart on a separate chart sheet in the workbook. **(Do not copy the chart- use the Move Chart tool**).



1. Open the workbook Part 1 Aficionado Guitar Parts Accounts Receivable Balance Report workbook created in Part 1. (If not already open).

2. Use the ctrl key and mouse to select the nonadjacent chart ranges A4:A10 and G4:G10. (*That is, select the range A4:A10 and while holding down the ctrl key, select the range G4:G10*).

3. Complete the following:

    a. Click the Bar button (Insert tab | Charts group) and then select Clustered Bar in 3-D in the 3-D Bar area.

    b. When the chart is displayed on the worksheet, click the Move Chart button (Chart Tools Design tab | Location group).

    c. When the Move Chart dialog box appears, click new sheet and then type Bar Chart for the sheet name.

    d. Click the OK button (Move Chart dialog box).

    e. Change the sheet tab color to the Green standard color.

4. When the chart is displayed on the new worksheet, do the following:

   a. Click on blank area of the chart, click the shape fill button and choose "Orange, Accent2, Darker 25%".

   b. Click on one of the chart bars to highlight all the bars, click the shape fill button andchoose "Standard Color,Green".

   c. Click on chart title and rename to Accounts Receivable

5. Drag the Accounts Receivable tab at the bottom of the worksheet to the left of the Bar Chart tab to reorder the sheets in the workbook. Delete any unused worksheets.

Unit 2 Assignment grading rubric = 65 points

| Assignment Requirements | Points Possible | Points Earned |
|---|---|---|
| The worksheet title and subtitle are entered and formatted. | 0-5 | |
| Column widths and row heightsare adjusted. | 0-5 | |
| Column and row titles are entered and formatted. | 0-5 | |
| Formulas are correctly entered for columns F and G. | 0-5 | |
| Totals in row 11 are entered correctly. | 0-5 | |
| The maximum, minimum, and average values are entered correctly in rows 12-14. | 0-5 | |
| Numbers are formatted appropriately. | 0-5 | |
| Conditional formatting is applied. | 0-5 | |
| A worksheet title and a color are applied to the sheet tab. | 0-5 | |

| | | |
|---|---|---|
| The document properties are changed, as specified by the instructor (fit on a single page in landscape). | 0-5 | |
| Student's information is added to the worksheet Header & Footer. | 0-5 | |
| A Clustered Bar in 3-D is created and moved to a new worksheet. | 0-5 | |
| The chart has appropriate data and formatting. | 0-3 | |
| The sheets are reordered in the workbook Worksheet, then Chart and extra blank worksheets deleted. | 0-2 | |
| **Total Points** | 65 | |

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