BA 206 Excel Project #1: Budget

**Summary:** You are going to create a budget table for the first quarter (the months January, February, and March) along with a Q1 Total. In the first Column (column A) will be listed categories and their corresponding subcategories. In the next columns (columns B, C, and D) will be the months January, February, and March. And finally, in the last column (column E) will be the Quarter 1 totals.

**Hint:** (Remember that the Undo Button can be used when errors are made -- Ctrl+Z on PC and Command+Z on Mac)

**Step 1**: Open Microsoft Excel and create a blank spreadsheet. Save the file as "Marketing Budget".

**Step 2**: To get started create the table headers in Row 2 type:

* In cell A2 type "CATEGORY"
* In cell B2 type "JAN"
* In cell C2 type "FEB"
* In cell D2 type "MAR"
* In cell E2 type "Q1 TOTALS"

**Step 3**: Now to enter the categories and sub categories (right below the categories) in Column A.

The Categories are:

Local Marketing (Sub-Categories Newspaper, In-Store, POP, and Banner Ads)

Content Marketing (Sub-Categories Sponsored Content and Landing Page)

Social Media (Sub-Categories Twitter, Facebook, Pinterest, and Instagram)

Online (Sub-Categories Blog, Website, and Mobile App

Advertising (Sub-Categories Online and Print)

* In cell A3 type "Local Marketing"
* In cell A4 type "Newspaper"
* In cell A5 type "In-Store"
* In cell A6 type "POP"
* In cell A7 type "Banner Ads"
* In cell A8 type "Content Marketing"
* In cell A9 type "Sponsored Content"
* In cell A10 type "Landing Page"
* Continue this for the rest of the categories and sub-categories listed above
* Finally in cell A23 type "TOTALS"

**Step 4**: Then enter the data for the corresponding sub-categories in the following format:

Newspaper - 600, 0, 0 means that in the Row with the sub-category newspaper, enter the values 600 for the January column, 0 for the February column and 0 for the March column.

* In cell B4 type "600"
* In cell C4 type "0"
* In cell D4 type "0"
* Continue this for the rest of the data values:

In-Store - 400, 0, 0

POP - 500, 0, 0

Banner Ads - 100, 100, 100

Sponsored Content - 500, 0, 0

Landing Page - 1200, 0, 0

Twitter - 100, 100, 100

Facebook - 100, 100, 100

Pinterest! - 100, 100, 100

Instagram - 100, 100, 100

Blog - 800, 0, 0

Website - 0, 0, 200

Mobile App - 0, 400, 0

Online - 2500, 0, 0

Print - 850, 0, 0

(**Note**: The categories Local Marketing, Content Marketing, Social Media, Online, and Advertising still have no values. We will create values using the "Sum" function)

**Step 5**: In order to distinguish the categories from the sub categories, format the table using a grey cell color fill. Select the cells in the row corresponding the to the Categories and fill them with a Light Grey color (in the dropdown menu of colors the far left/middle is a good choice)

* Select A3 through E3 then using the paint bucket on the Ribbon (on the home tab) select a light grey color.
* Select A8 through E8 and accent cell styles
* Select A11 through E11 and accent cell styles
* Select A16 though E16 and accent cell styles
* Select A20 through E20 and accent cell styles
* To format the header row select A2 through E3 and fill the cells black and make the text color white.

**Step 6**: To use any function in Excel, begin by typing "=" into the cell followed by the desired function. We will create the category totals using the "Sum" function. Each Category will total it's sub-categories for each month. To total the Category Local Marketing for January go the Local Marketing Row, over to the JAN column and use the sum function to total the cells below from Newspaper to Banner Ads.

* In cell B3 type "=sum(B4:B7)"  
  (**Note**:B4 and B7 correspond to the first and last sub-categories)
* In cell C3 type "=sum(C4:C7)"
* In Cell D3 type "=sum(D4:D7)"
* For the next category, Content Marketing, in cell B8 type "=sum(B9:B10)"
* In cell C8 type "=sum(C9:C10)"
* In cell D8 type "=sum(D9:D10"
* Continue entering the sum function for the remaining category months

**Step 7**: Finally create a Totals row on the very last row by adding individual cells in each column. Again use the "=sum" to start using a formula then use the cell reference and "," to distinguish the desired cells. We only need to add the cells with the category totals (so we don't want to use ":" for example "=sum(B3:B22)" would incorrectly double the desired value). Then auto size each column to make sure the text fits.

* In cell B23 type "=sum(B3,B8,B11,B16,B20)"
* In cell C23 type "=sum(C3,C8,C11,C16,C20)"
* In cell D23 type "=sum(D3,D8,D11,D16,D20)"
* In cell E23 type "=sum(E3,E8,E11,E16,E20)"
* Select cells A23 through E23 and change to white text and black color fill
* Select cells B3 through E23 and select Accounting Number Format
* **Hint:** If done correctly “0”s will turn into “-“