

## Welcome to Wil-Shire & Finch, Inc.!

Wil-Shire & Finch, Inc. is a (fictitious) very successful wholesale home furnishings distributor with locations spanning across the United States. Having been in business for over 10 years they have an outstanding reputation with their unique customer base.

As the new office assistant for Wil-Shire & Finch, your first task is to complete the instructions given below using the start file names, "USITCC Competition Start File Excel 2022" with supporting file named, "Sales Data".

\*As a new employee we should warn you, Wil-Shire & Finch is on a tight schedule! You will need to complete all instructions for the Excel workbook, build a Word document (separate instructions), create a Power Point (separate instructions) all within 3 hours! Once all tasks are complete, upload your files to the USITCC Regional Student Competition-Office Solutions Moodle site.

\*When finished you will be submitting an Excel Workbook, a Word document, and a PowerPoint file.

Good luck!

## USITCC Office Solutions

## Excel Instructions

| Instructions | Action                                                                                                                                                        |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1            | Create a new sheet named, "Documentation" and enter team number and a date using a function                                                                   |
| 2            | Create a new sheet named, "Summary" and rename Sheet1:Sheet 4 as Quarters                                                                                     |
| 3            | Copy title and subtitle from Quarter 1 to other quarters using formula                                                                                        |
| 4a           | Calculate Gross Revenue, COGS, Expenses, and Net Profit for January                                                                                           |
| 4b           | Calculate the same for the February with growth from January using given growth factor, round to whole, and then March growth from February                   |
| 4c           | Quarter2-calculate April with growth from March in Q1 sheet                                                                                                   |
| 4d           | Complete May/June in Q2, and Q3/Q4                                                                                                                            |
| 4e           | Calculate Gross Revenue, COGS total, Gross Profit, Total Expenses, Net Profit for all quarters                                                                |
| 4f           | Calculate the total of each item in column E for all quarter sheets                                                                                           |
| 4g           | Format Gross Revenue/profit, Total expenses, and Net Profit with Top and Double border                                                                        |
| 4h           | Format numbers with comma style and 0 decimals                                                                                                                |
| 5a           | Summary sheet enter titles and labels using 3d referencing to calculate Gross Revenue, Gross Profit, Total Expenses, and Net Profit for the combined quarters |
| 5b           | Furniture sales sheet, merge/center, apply title, and fill color, short date                                                                                  |
| 5c           | Furniture sales-apply conditional formatting                                                                                                                  |
| 5d           | Create new column-Discount, add If/And statement                                                                                                              |
| 5e           | Create a pivot table showing total number of each product sold by the region, move to furniture sales                                                         |
| 6a           | On the Employees sheet calculate-years of service                                                                                                             |
| 6b           | Insert column Rate of Increase, add VLOOKUP, and calculate new salary                                                                                         |
| 6c           | Create chart on the chart sheet                                                                                                                               |
| 6d           | Add new sheet Query and build a query based on sale person's customers and region                                                                             |
| 6e           | Create a macro for sales data                                                                                                                                 |

## USITCC Office Solutions

## Word Instructions

| Instructions | Action                                                                                                                                                       |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1            | Create a letter to the shareholders of the company detailing the information you calculated in the Excel Workbook, choose appropriate theme, and be creative |
| 2            | Use appropriate font, style for the company name and create a logo                                                                                           |
| 3            | Create a title, add a page border, watermark, and use appropriate color                                                                                      |
| 4            | Provide quarterly results, and overall summary                                                                                                               |
| 5            | Create a table to showcase the summary results                                                                                                               |
| 6            | Create another table to showcase furniture sales by the products and by the region, and the totals                                                           |
| 7            | On the table, highlight important statistics                                                                                                                 |
| 8            | Create a chart that breaks the total of home product sales by the percentage of the total sales                                                              |
| 9            | Briefly give your analysis about the position of the company                                                                                                 |
| 10           | Have a proper closing                                                                                                                                        |

USITCC Office Solutions

PowerPoint Instructions

| Instructions | Action                                                                                                                                                        |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1            | After finishing the letter, your boss asks you to make a PowerPoint Presentation that will be used at the annual Shareholders meeting. It should be creative. |
| 2            | Use appropriate theme, the company name, subtitle, and a logo                                                                                                 |
| 3            | Display the summary results from the Excel workbook for the year 2022                                                                                         |
| 4            | Provide quarterly results, and overall summary                                                                                                                |
| 5            | Display furniture sales data by the products and by the region, and the grand total of all                                                                    |
| 6            | Create a chart to display home product sales                                                                                                                  |
| 7            | Have a proper closing                                                                                                                                         |