PRACTICE TEST WITH ANSWER GUIDE

Excel Skills Assessment for Job Interviews

This Excel test is designed to simulate the types of practical tasks commonly used in job interviews for administrative, finance, HR, and analyst roles. Employers use these exercises to evaluate your ability to:

- Clean and organize raw data
- Apply essential formulas (e.g., IF, VLOOKUP, SUMIF)
- Use filters, PivotTables, and charts for reporting
- Format and present spreadsheets professionally

All tasks reflect real-world scenarios you may encounter in day-to-day work. You are encouraged to complete the test using only standard Excel tools, without automation or third-party plugins. A calculator and internet are allowed if needed, but formulas must be written manually.

Use this assessment to sharpen your interview readiness or to test the Excel proficiency of job applicants in a hiring setting.

Task 1: Clean and Organize Staff Records

Context: You've been given a staff list exported from an old system. It contains:

- Names in ALL CAPS
- Duplicate employee entries
- Start Dates in inconsistent formats (e.g., 01/12/2023, 2023-12-01, 12.01.2023)

Your Task:

- Convert all names to Proper Case (e.g., "JOHN SMITH" → "John Smith")
- Remove exact duplicate rows
- Format all Start Dates as DD/MM/YYYY
- Sort the list alphabetically by Department

Task 2: Calculate Sales Totals by Employee

Context: The sales team logs every transaction. One employee may appear multiple times with different sale values. Management wants to know each person's total sales for the month.

Your Task:

- Use the SUMIF function to calculate total sales per employee
- Display results in a clean summary table with two columns: Employee Name and Total Sales

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Task 3: Highlight Overdue Tasks

Context: You've been given a task tracker that includes due dates and status. Management needs a quick visual indicator of which tasks are overdue and incomplete.

Your Task:

- Apply Conditional Formatting to highlight any task where:
  - The due date is **before today**, and
  - The status is **not marked as "Done"**

Task 4: Lookup Job Titles Using Employee ID

Context: You have one sheet listing employee names and IDs. A second sheet lists IDs and job titles. You need to populate the missing job title information in the main sheet.

Your Task:

- Use VLOOKUP or XLOOKUP to return each employee's job title from the lookup table
- Ensure the function returns "Not Found" for missing matches instead of errors

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Task 5: Filter and Export High-Value Invoices

Context: You've received a list of 1,000 invoices. Your manager wants to review only those where the invoice amount exceeds $5,000.

Your Task:

- Apply a filter to display only invoices over $5,000
- Copy the filtered results into a new sheet named "High Value"
- Format the Amount column in Currency format with two decimal places

Task 6: Create a Monthly Sales PivotTable

Context: You are provided with a detailed transaction log containing columns like Date, Region, Salesperson, and Sale Amount. Your manager needs to understand sales trends over time.

Your Task:

- Insert a PivotTable summarizing **total sales by month**
- Group the dates to display results in monthly format (e.g., Jan, Feb, etc.)
- Sort the results in descending order by total sales

Task 7: Generate a Customer Satisfaction Chart

Context: You have collected survey data from customers who rated their experience from 1 to 10. You need to visually present the distribution of scores.

Your Task:

- Use the count of each rating (1 to 10) to create a summary table
- Build a **column chart** from the summary to display customer rating distribution
- Title the chart appropriately and label axes clearly

Task 8: Identify Duplicates Using a Formula

Context: A supplier list may contain multiple duplicate company names with different formatting. You are tasked with identifying these duplicates.

Your Task:

- Use the COUNTIF function to flag duplicate company names in a new column
- Mark rows with more than one occurrence as "Duplicate"
- Apply Conditional Formatting to highlight those rows

Task 9: Calculate Payment Status

Context: You have a payment tracker with columns for Invoice Amount and Paid Amount. Management wants to know which invoices are fully paid, partially paid, or unpaid.

Your Task:

- Create a new column titled "Payment Status"
- Use an IF or IFS formula to return one of the following:
  - "Paid" if Paid Amount = Invoice Amount
  - "Partially Paid" if Paid Amount > 0 but less than Invoice
  - "Unpaid" if Paid Amount = 0

Task 10: Clean Number Formatting in Financial Report

Context: A financial report contains a column of cost values with inconsistent formatting — some stored as text, others missing decimals.

Your Task:

- Convert all values in the Cost column to actual numbers
- Format the column in **Currency** with **two decimal places**
- Align the values to the right for professional presentation

Answer Guide: Tasks 1–10

Task 1: Clean and Organize Staff Records

How to Do It:

1. **Convert names to Proper Case:**
   Use the formula: =PROPER(A2)
   Then copy-paste as values back into the original column.
2. **Remove duplicates:**
   Go to **Data > Remove Duplicates** > Select all relevant columns > Click OK.
3. **Format dates:**
   Select the date column > **Right-click > Format Cells > Date** > Choose format DD/MM/YYYY.
4. **Sort by Department:**
   Select full table > Go to **Data > Sort** > Choose "Department" column A–Z.

Task 2: Calculate Sales Totals by Employee

How to Do It:

1. Create a unique list of employee names (copy-paste > Remove Duplicates).
2. Use the SUMIF formula:
   =SUMIF(SalesData!A:A, A2, SalesData!B:B)
   (A:A = Name column in raw data, A2 = name in your summary list, B:B = sales amount column)
3. Apply currency formatting to the Total column.

Task 3: Highlight Overdue Tasks

How to Do It:

1. Select all rows of task data.
2. Go to **Home > Conditional Formatting > New Rule > Use a Formula**.
3. Enter this formula (assuming Due Date is in column C and Status in column D):
   =AND(C2<TODAY(), D2<>"Done")
4. Set a light red fill or yellow highlight for visual impact.

Task 4: Lookup Job Titles Using Employee ID

How to Do It:

1. Use VLOOKUP if using older Excel:
   =VLOOKUP(A2, Sheet2!A:B, 2, FALSE)
2. Use XLOOKUP in modern Excel:
   =XLOOKUP(A2, Sheet2!A:A, Sheet2!B:B, "Not Found")
3. Drag down the formula to fill for all employees.

Task 5: Filter and Export High-Value Invoices

How to Do It:

1. Select your invoice table.
2. Go to **Data > Filter** (or Ctrl + Shift + L).
3. Click the dropdown on the Amount column > **Number Filters > Greater Than > 5000**.
4. Copy visible rows > Paste into a new sheet called **High Value**.
5. Format Amount column: **Right-click > Format Cells > Currency**.

Task 6: Create a Monthly Sales PivotTable

How to Do It:

1. Select the full sales table > **Insert > PivotTable** > Place in new sheet.
2. In Pivot editor:
   - Drag “Date” to **Rows**
   - Drag “Sales Amount” to **Values**

   - Right-click any date > **Group > By Months**

3. Sort results: Right-click total sales > Sort > Largest to Smallest.

Task 7: Generate a Customer Satisfaction Chart

How to Do It:

1. Create a frequency table using COUNTIF:
   =COUNTIF(RatingRange, 1), =COUNTIF(RatingRange, 2), etc.
2. Select the frequency table > **Insert > Column Chart**.
3. Add chart title: e.g., "Customer Satisfaction Distribution".
4. Label axes: Scores (1–10) vs. Count of Responses.

Task 8: Identify Duplicates Using a Formula

How to Do It:

1. Add a new column titled **Duplicate Check**.
2. Use formula:
   =IF(COUNTIF(A:A, A2)>1, "Duplicate", "")
3. Apply Conditional Formatting to highlight cells where this = "Duplicate".

Task 9: Calculate Payment Status

How to Do It:

1. Add a new column titled "Payment Status".
2. Use a nested IF formula:
   =IF(B2=0,"Unpaid", IF(B2<A2, "Partially Paid", "Paid"))
   (Assumes A2 = Invoice Amount, B2 = Paid Amount)
3. Apply color coding (optional) using Conditional Formatting.

Task 10: Fix Number Formatting in Financial Report

How to Do It:

1. Use VALUE() function if data is stored as text:
   =VALUE(A2) and copy-paste values back.
2. Select the column > **Right-click > Format Cells > Currency**.
3. Use **Align Right** from the toolbar for clean presentation.

Final Notes

This assessment is not meant to trick you — it's designed to reveal your comfort level with real tasks professionals perform using Excel every day. **We hope this guide was helpful in preparing you for Excel-related job interviews.**
If you found it valuable, feel free to share Our Blog with colleagues

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