

Conditional Formatting – Tips and Tricks

Do you want to highlight numbers that have certain conditions?

In all cases below, complete the following steps:

1. Highlight your list (**Ctrl** and **Shift** and **Arrow Down** will select the text)
2. **Home – Conditional Formatting – Highlight Cells Rules** – enter the cell reference (e.g. \$A\$1 – You can use F4 to keep the cell fixed) or actual value e.g. 10
3. Then choose the colour you want to use from one of the preset options (or use **Custom – Fill** – to select another colour)

I want to highlight those numbers that are:

Larger than my reference – choose

Greater Than

Smaller than my reference, choose

Less Than

Between two numbers **Between** – enter the lower of the two numbers (or a fixed cell reference containing it) on the left, then enter the higher of the two values (or a fixed cell reference containing it) in the box beside it.

Outside a specified range

i.e. only numbers that are less than 10 and greater than 20 i.e Not Between

1. Highlight the cells you want to apply it to.
2. **Home – Conditional Formatting – New Rule – Only Format cells that contain**
3. Click on the dropdown box that says **Between**
4. Choose **Not Between**
5. Enter 10 and 20 here (as examples)

I want to see data that contains certain words

Choose **Text That Contains**

Enter the text you want found in box on left.

I want to see data that corresponds to specified dates

Choose **A Date Occurring**

(note that you will have to choose from one of the options from the dropdown list i.e.

Yesterday, Today, Tomorrow, In the last 7 days, Last Week, This Week, Next Week, Last Month, This Month, Next Month)

I want to see all my duplicate values

(Note in this case, duplicate values means all values that occur more than once)

Home – Conditional Formatting – Highlight Cells Rules – Duplicate Values

(make sure you choose **Duplicate** from dropdown on left)

I want to see all my unique values

Home – Conditional Formatting – Highlight Cells Rules – Duplicate Values

(make sure you choose **Unique** from dropdown on left)

I want to know what values are higher or lower just by looking at my pivot table.

1. Create your pivot table
2. Click on a cell
3. **Home – Conditional Formatting – Data Bars** (or you could choose **Gradient Fill** as well)
4. Choose the **Fill** you want to apply
5. You will see a tiny icon appearing at the corner of the formatted cell.

Choose the third option (this will vary depending on what fields you have in your data table)

I want to specify the values that are yes, no and maybe – using icons.

In all cases below, complete the following steps:

1. Highlight your list (**Ctrl** and **Shift** and **Arrow Down** will select the text)
2. **Home – Conditional Formatting – Icon sets**
3. Choose an **Icon Set**
4. Your data should now be formatted with various icon sets.
5. (I am going to assume you have chosen a 3 light icon set)
6. Now you are going to modify the rule that Excel has created.
7. Staying highlighted, choose
8. **Home – Conditional Formatting – Manage Rules**
9. Choose the rule you want to edit i.e. icons
10. Click on **Edit Rule**
11. Change **Type** from **Percent** to **Number**
12. Beside the **green icon** in the values box, enter the **value** corresponding to green.
13. Change the **> to > or >=** as required.
14. Note that this new value now appears underneath for the orange icon.
15. **Repeat for the lower value.**
16. Click **OK**
17. Click **Apply**

I want to sort my lists in icon order

1. Click in list
2. Click **Data – Sort**
3. **Sort by** – column with icons
4. **Sort on** – Choose icons from list
5. Then choose the colour icon you want to appear on top
e.g. Green
6. Choose **Copy Level**. Change colour icon to next colour e.g. orange.

Continue until you have sorted accordingly. Then click **OK**

I want to create a rule that lets me know when deadlines are coming up.

1. In all cases below, complete the following steps:
2. Highlight your list (**Ctrl** and **Shift** and **Arrow Down** will select the text. Make sure you have started at the top left hand corner – this is very important for work with dates.
3. **Home – Conditional Formatting – New Rule – Use a formula to determine which cells to format**
4. In the formula box enter the following formula (assuming A2 is where the dates begin)
=A2 <=today() +30
5. Choose the colour you want to apply.
6. Click **OK**.

Note this formula will colour all dates within 30 days of today.

I want to create a rule with more than one condition.

Let's say you want your cells to go red but only when the entry in one cell is No e.g. B4 and the date within another cell is within 30 days of today.e.g. H2

1. Highlight your text and then follow the steps above.
2. Use this formula:
3. **=And(\$b4="no",\$h2<=today()+30)**

I want to see all the numbers above (or below) average.

1. Highlight your cells
2. **Home – Conditional Formatting – Top/Bottom Rules – Above Average**
3. **(or Below Average)**
4. Choose the colour you want to apply
5. Click **OK**.
6. You can now sort these numbers if you wish.

I want my conditional formatting to have a stripe effect

Let's say you want to REALLY EMPHASISE a date by having a stripe go all the way across your list.

1. Begin by highlighting the top row.
2. Highlight your list (**Ctrl** and **Shift** and **Arrow Down** will select the text.)
3. Then apply your formatting as usual.
4. This will cause the conditional formatting to appear across every cell in the row it applies to.

I want to show the top 10 sales values in my list

Usual steps to highlight the data. **Home – Conditional Formatting – Top/Bottom Rules – Top 10 items**

Note that you can adjust this number to something other than 10

You can then sort this list by using the steps in

I want to sort my lists in icon order

Just make sure you choose colour rather than icons in your sorting list.

I want to apply the same conditional formatting to other cells in the same sheet

Method 1

1. Click on cell with the conditional formatting you want to copy
2. Click on **Format Painter** (Home tab – check left hand side)
3. A small brush appears on your mouse pointer
4. Highlight the cells you want to apply the conditional formatting to
5. If you want to copy the formatting to more than one cell/range, double click on the Format Painter icon
6. Note that you may need to press ESC to remove when you are complete

Method 2

(where you just want to extend the range of the conditional formatting)

1. Click on cell with the conditional formatting you want to copy
2. **Home – Conditional Formatting – Manage Rules**
3. Click in the **Applies To** box
4. Note that “marching ants” will appear around the data with conditional formatting
5. Now drag the bottom right hand corner of this selection to extend the formatting to the other cells

I want to apply the same conditional formatting to other sheets in the same workbook.

1. Click on cell with the conditional formatting you want to copy
2. **Home – Conditional Formatting – Manage Rules**
3. Click in the **Applies To** box
4. Now from the dropdown box at top select the sheet you want to copy it to.
5. You will now get new rules
6. Note that you may need to adjust the settings of these new rules to reflect the data in the sheet you have applied the copying to.

How do I remove conditional formatting?

Highlight the text you want to remove the formatting from

Home – Conditional Formatting – Clear Rules – Selected Cells or **Entire Sheet**