Claude's Excel skill: messy export in, clean workbook with formulas out

Claude's built-in Excel skill, **xlsx**, builds real workbooks with working formulas and charts. There's nothing to install. Willow Creek Plant Shop is a made-up business.

Set up and upload

1. Account menu, **Settings**, **Capabilities**: turn on **Code execution and file creation**.
2. In a new chat, click **+**, then **Upload or add files**, and pick your CSV export.
3. Paste the request below and send it.

Say exactly what you want

```
This is our [SYSTEM] export for [PERIOD]. Clean it up and turn it into an Excel workbook with: a Data tab with one clean row per sale (one date format, amounts as numbers, no duplicates or subtotal lines, consistent category names), a Summary tab with total sales by month and category using formulas, and a column chart of monthly sales by category. Tell me what you changed.
```

Open the line above the reply and look for **Loaded skill xlsx**.

Read what Claude changed

- The lesson's list: title lines skipped, dates in one format, text amounts made numbers, category spellings merged, 3 subtotal lines and 2 duplicate rows removed.
- Check each duplicate. If one was a real second sale, tell Claude to put it back.
- One more change? Ask in plain words: "Highlight the top category in each month in light green." Claude adds a conditional formatting rule.

Check it in Excel

1. Open the download and click **Enable Editing** in **Protected View**.
2. Click one month's category total, like **B4**. The formula bar should show **=SUMIFS(...)**, not a typed number.
3. Tie one month to the source: the export's July subtotal line was **$900.75**.

Remember: Ask for formulas, then read what Claude changed and check a few totals against the original before you share the file.

Practice it free: Claude's Excel Skill: Turn a Messy Export into a Clean Workbook at learn.ynteractive.com/modules/claude-skills-excel. This sheet: learn.ynteractive.com/content/cheat-sheets/claude-skills-excel. Willow Creek Plant Shop is a made-up business from the lesson. By Robert Breen, October 20, 2026.