

Excel and Word for the web: top customers from a sales export and a one-page client update

Modules 2 and 3 of the free Excel and Word for the Web Jump Start, practised there on real Microsoft 365 screens.

Clean the export (Excel)

1. Paste the export into **A1** of a blank workbook: headers in row 1, one row per order.
2. Click a cell in the list, then **Data > Remove Duplicates**.
3. Keep every column and **My data has headers** ticked, **OK**. Excel says how many rows it removed.

Top customers with a PivotTable

Insert

Insert > PivotTable, then **New sheet** under Create your own PivotTable.

Group

Tick **Customer**: it goes into **Rows**.

Total

Tick **Amount**: it goes into **Values** as **Sum of Amount**.

Sort

Click a total, **Data > Sort Descending**: biggest customer first.

Money

Select the totals, **Home > number format > Currency**.

Notes into a client update (Word)

1. Paste the notes into a blank document. Word may offer Copilot: **Not now** is fine.
2. First line: **Styles > Title**. Each section line: **Styles > Heading 1**.
3. Select what was done, click **Bullets**.
4. End of Next steps, **Enter**, **Insert > Table > 3x4**: Task, Owner, Due. **Tab** moves to the next cell.
5. In the table: **Table** tab, table styles arrow, a **Grid Table** with a dark header.

Before it goes out

- Select anything to check, **Review > New Comment**. Type **@name** to notify a colleague.
- Resolve or delete comments before you send the update to the client.
- Check one PivotTable total by hand the first time.

Remember: Clean the data before you count it, and use styles instead of fonts: the totals stay right and every update looks the same.

Practice it free: Excel for the Web: Find Your Top Customers in a Sales Export at learn.ynteractive.com/modules/excel-web-top-customers. This sheet: learn.ynteractive.com/content/cheat-sheets/excel-pivottable-and-word-update. Lena's office-supply shop and Northgate IT is a made-up business from the lesson. By Robert Breen, October 23, 2026.