UNLOCK FUTURES · OFFICE SKILLS PRACTICE

Word and Excel Together

The Monthly Sales Report Project · Basic to Intermediate

You have just started as an **administration assistant at Bayside Office Supplies**, a small business in Dandenong South that delivers paper, ink, furniture and technology to local clinics, schools and offices. Your manager has handed you two files: a spreadsheet of every order from October, and a rough draft of the monthly sales report. Your job is to work out the numbers in **Excel**, tidy up the report in **Word**, and then bring the two together into one professional report.

At a glance	
Level	Basic to intermediate. Tasks are marked ★ Foundation, ★★ Building or ★★★ Stretch (optional).
Time	About 3 to 4 hours. Works well as three sessions: Part 1 Excel, Part 2 Word, Part 3 Together.
Files you need	`Bayside_Sales_October_STARTER.xlsx` and `Bayside_Report_DRAFT.docx`
Excel skills	Formatting, freeze panes, formulas, AutoSum, absolute references, SUM, AVERAGE, MAX, MIN, COUNTA, COUNTIF, SUMIF, IF, VLOOKUP, conditional formatting, sort and filter, charts, PivotTables
Word skills	Spell check, Find and Replace, styles, bulleted and numbered lists, line spacing, margins, headers and footers, page numbers, page breaks, table of contents, captions, saving as PDF
Combined skills	Copying data and charts from Excel into Word, paste options, linked data

Before you start: make a new folder called `Bayside Project` on your computer and put both starter files in it. Save your work often with `Ctrl + S`. If something goes wrong, `Ctrl + Z` undoes your last step.

> **Tip:** Want to check your work? The full answer key is free on request. Visit **unlockfutures.com.au/word-excel-together** or email **skillsforward@unlockfutures.com.au** once you have finished.

Bayside Office Supplies, its customers and staff are fictional and were created for practice only.

Part 1 · Working with the numbers in Excel

Open `Bayside_Sales_October_STARTER.xlsx`. It has three sheets (tabs along the bottom): **Orders** holds the 40 October orders, **Products** is the price list, and **Summary** is where you will build your results. Some columns on the Orders sheet have headings but no data yet. You will fill them in.

Task 1 Save your own copy ★ Foundation

1. Click **File > Save As** and choose your `Bayside Project` folder.
2. Name the file `Bayside_Sales_YourName.xlsx` (use your own name) and click **Save**.
3. Click each sheet tab to see what is in the workbook, then return to **Orders**.

Task 2 Make the headings stand out ★ Foundation

1. Select the headings in **A1:N1**.
2. On the **Home** tab, click **Bold**, choose a dark **Fill Colour** and change the **Font Colour** to white.
3. Click **Wrap Text** and **Center** so long headings fit neatly.
4. Select columns **A to N**, then double-click any border between two column letters to **AutoFit** the widths.
5. Click **View > Freeze Panes > Freeze Top Row**. Scroll down: the headings should stay in place.

Task 3 Format dates and prices ★ Foundation

1. Select column **B** (Order Date). Click **Home > Number Format** drop-down **> Short Date** so dates show as `01/10/2026`.
2. Select column **I** (Unit Price) and choose **Currency** so prices show with a dollar sign and two decimals.

Task 4 Calculate the Subtotal ★ Foundation

Subtotal is the price of one item multiplied by the quantity ordered.

1. Click cell **K2** and type `=I2*J2` then press **Enter**.
2. Click **K2** again. Double-click the small square at the bottom-right corner of the cell (the **fill handle**) to copy the formula down to row 41.

> ✔ **Check:** K2 should show **567** (3 filing cabinets at $189.00).

Task 5 Calculate GST with an absolute reference ★★ Building

GST in Australia is 10 per cent. The rate is stored once on the **Summary** sheet in cell **B3** (the yellow cell). Every GST formula should point to that one cell, so if the rate ever changed you would only update it in one place.

1. Click **L2** and type `=K2*Summary!$B$3` then press **Enter**.
2. Copy the formula down to row 41 with the fill handle.

> **Tip:** The `$` signs **lock** the reference so it does not move when you copy the formula down. Instead of typing them, click on the cell reference in the formula and press **F4**. If your copied GST cells show 0, check that you included the `$` signs.

> ✔ **Check:** L2 should show **56.7**.

Task 6 Calculate the Total ★ Foundation

1. Click **M2** and type `=K2+L2` then press **Enter**. Copy it down to row 41.
2. Select columns **K, L and M** and format them as **Currency**.

✔ **Check:** M2 should show **$623.70**.

Task 7 Add a totals row with AutoSum ★ Foundation

Leave **row 42 empty**. The blank row tells Excel where the data ends, which matters when you sort and filter later.

1. In **I43** type `TOTAL`.
2. Click **J43** and press `Alt + =` (AutoSum). Check that the dotted box covers **J2:J41**, then press **Enter**.
3. Do the same in **K43, L43 and M43**. Make row 43 bold and add a top border (**Home > Borders > Top and Double Bottom Border**).

✎ **Total sales including GST (M43):** _____

Task 8 Look up product names with VLOOKUP ★★ Building

Column G is empty. The product names are on the **Products** sheet. VLOOKUP finds a product code in the price list and brings back the matching name.

1. Click **G2** and type `=VLOOKUP(F2,Products!$A$2:$D$11,2,FALSE)` then press **Enter**.
2. Copy the formula down to row 41 and AutoFit column G.

Part of the formula	What it means
`F2`	What to look for: the product code in this row
`Products!$A$2:$D$11`	Where to look: the price list (locked with $ signs)
`2`	Which column to bring back: column 2 of the list is Product Name
`FALSE`	Only accept an exact match

✔ **Check:** G2 should show **Filing Cabinet (3 Drawer)**. If you see `#N/A`, check the product code and the range.

Tip: Using Excel 365? Try the newer XLOOKUP as well: `=XLOOKUP(F2,Products!$A$2:$A$11,Products!$B$2:$B$11)`. Both give the same answer.

Task 9 Flag bulk orders with IF ★★ Building

Bayside calls any order of **10 or more** units a bulk order.

1. Click **N2** and type `=IF(J2>=10,"Yes","No")` then press **Enter**.
2. Copy it down to row 41.

Tip: Read the formula out loud: “If the quantity is greater than or equal to 10, show Yes, otherwise show No.”

Task 10 Highlight large orders ★★ Building

1. Select **M2:M41** (the order totals, not the TOTAL row).
2. Click **Home > Conditional Formatting > Highlight Cells Rules > Greater Than**.
3. Type `500`, choose **Light Red Fill with Dark Red Text** and click **OK**.

✎ **How many orders are highlighted?** _____

Task 11 Sort and filter the orders ★★ Building

1. Select **A1:N41** and click **Home > Sort & Filter > Filter**. Small arrows appear in the headings.
2. Click the arrow on **Category**, untick **Select All**, tick **Furniture** and click **OK**.

✎ **How many Furniture orders were there?** _____

3. Clear the filter: click the Category arrow **> Clear Filter From "Category"**.
4. Click the arrow on **Total** and choose **Sort Largest to Smallest**.

✎ **Which customer placed the single largest order?** _____

5. Put the list back in order: click the arrow on **Order ID** and choose **Sort A to Z**.

Task 12 Build the Summary sheet ★★ Building

Go to the **Summary** sheet. Type these formulas into column B next to each label. Format the money cells as Currency.

Cell and label	Formula	What it does
B6 Number of orders	`=COUNTA(Orders!A2:A41)`	Counts cells that are not empty
B7 Total items sold	`=SUM(Orders!J2:J41)`	Adds up the quantities
B8 Total sales	`=SUM(Orders!M2:M41)`	Adds up the totals
B9 Average order	`=AVERAGE(Orders!M2:M41)`	Finds the average
B10 Largest order	`=MAX(Orders!M2:M41)`	Finds the biggest value
B11 Smallest order	`=MIN(Orders!M2:M41)`	Finds the smallest value
B12 Bulk orders	`=COUNTIF(Orders!N2:N41,"Yes")`	Counts only the Yes cells

Sales by category. These formulas look at the category name in column A and only count or add the matching orders.

1. In **B16** type `=COUNTIF(Orders!$H$2:$H$41,A16)`
2. In **C16** type `=SUMIF(Orders!$H$2:$H$41,A16,Orders!$M$2:$M$41)`
3. Select **B16:C16** and copy both formulas down to row 20. Add totals in **B21** and **C21** with AutoSum.
4. **Sales by rep:** fill in **B25:C27** yourself. Use the same formulas, but the sales rep names are in column **E** of the Orders sheet.

> ✔ **Check:** C21 should match your TOTAL in Orders cell **M43**. If they are different, one of your ranges is wrong.

✎ **Best-selling category:** _____

✎ **Sales rep with the highest sales:** _____

Task 13 Create a column chart ★★ Building

1. On the Summary sheet, select **A15:A20**, then hold **Ctrl** and select **C15:C20**.
2. Click **Insert > Insert Column or Bar Chart > Clustered Column**.
3. Click the chart title and type `Sales by Category — October 2026`.
4. Click the **+** button beside the chart and tick **Data Labels**. Untick **Legend** (one series does not need one).
5. Drag the chart so it sits to the right of your tables. Save your workbook.

Task 14 Stretch: summarise customers with a PivotTable ★★★

Stretch – optional

1. On the Orders sheet, click any cell in **A1:N41** and choose **Insert > PivotTable > From Table/Range**. Check the range is **A1:N41**, choose **New Worksheet**, click **OK**.
2. In the field list, drag **Customer** to **Rows** and **Total** to **Values**.
3. Right-click a number in the PivotTable **> Sort > Sort Largest to Smallest**. Format the values as Currency.

✎ **Which customer spent the most in October?** _____

Part 2 · Tidying the report in Word

Open `Bayside_Report_DRAFT.docx`. It is a rough draft: every line looks the same, there are spelling mistakes, and the numbers are missing. Leave the words in [square brackets] for now. You will fill them in during Part 3.

Task 15 Save your own copy ★ Foundation

1. Click **File > Save As** and name the file `Bayside_Report_YourName.docx` in your Bayside Project folder.
2. Replace **[Your Name]** near the top with your own name.

> **Tip:** Click **Home > Show/Hide ¶** to see where each paragraph ends. It makes formatting much easier to follow.

Task 16 Fix the spelling ★ Foundation

1. Press `Ctrl + Home` to go to the top, then press **F7** (or **Review > Spelling & Grammar**).
2. There are **five** spelling mistakes. Choose the correct spelling for each one.
3. Word may also flag names like Dandenong or Bayside. These are correct, so click **Ignore**.

✎ **List the five words you corrected:** _____

Task 17 Use Find and Replace ★ Foundation

The business name is wrong throughout the draft. It should be **Bayside Office Supplies**.

1. Press `Ctrl + H` to open **Find and Replace**.
2. Find what: `Bayside Supplies` Replace with: `Bayside Office Supplies`
3. Click **Replace All**. Word tells you how many changes it made.

✎ **How many replacements did Word make?** _____

Task 18 Apply heading styles ★ Foundation

Styles make a document look consistent and let Word build a table of contents automatically. Click in a line, then click the style on the **Home** tab.

Style	Apply it to
Title	Monthly Sales Report
Subtitle	Bayside Office Supplies – October 2026
Heading 1	Introduction · About the Business · Sales Results · Recommendations
Heading 2	Overview · Sales by Category · Sales by Team Member · Bulk Orders · Next Steps

> ✔ **Check:** Click **View > Navigation Pane**. All your headings should appear in the panel on the left, with Heading 2s indented under Heading 1s.

Task 19 Make bulleted and numbered lists ★ Foundation

1. Select the three goals under “Our goals for this quarter are:” and click **Home > Bullets**.
2. Select the three lines under **Next Steps** and click **Home > Numbering**.

> **Tip:** Use bullets when order does not matter and numbers when the steps happen in order.

Task 20 Set fonts, spacing and margins ★★ Building

1. On the Home tab, right-click the **Normal** style and choose **Modify**. Set the font to **Arial, 11 pt** and click **OK**. All body text updates at once.
2. Press `Ctrl + A` to select everything, then click **Home > Line and Paragraph Spacing > 1.15** and **Add Space After Paragraph**.
3. Click **Layout > Margins > Moderate**.
4. Click away to deselect. The body text should now be easier to read.

Task 21 Add a header and footer with page numbers ★★ Building

1. Click **Insert > Header > Blank** and type `Bayside Office Supplies  |  October 2026 Sales Report`.
2. Click **Insert > Page Number > Bottom of Page > Plain Number 2** to add a centred page number.
3. Click **Close Header and Footer** (or double-click the body text).

Task 22 Create a cover page and table of contents ★★ Building

1. Click at the very start of the **Introduction** heading and press `Ctrl + Enter` to insert a page break. The title details now sit on their own cover page.
2. On the cover page, click at the end of the **Date** line and press **Enter** twice.
3. Click **References > Table of Contents > Automatic Table 1**.

> ✔ **Check:** The table of contents should list all your Heading 1 and Heading 2 headings with page numbers. If one is missing, check its style.

Save your document.

Part 3 · Bringing Excel and Word together

Open **both** files and keep them side by side. Click the Windows key and the left or right arrow to snap each window to half of the screen, or use **View > View Side by Side**.

Task 23 Fill in the numbers ★ Foundation

The report has six placeholders in square brackets. Replace each one with the figure from your Summary sheet.

1. In Word, press `Ctrl + F` and search for `[` to jump to each placeholder.
2. Select the whole placeholder, including the brackets, and type the correct figure from Excel.

Placeholder	Where to find it in Excel
[TOTAL ORDERS]	Summary B6
[TOTAL SALES]	Summary B8 (type it like $1,234.56)
[AVERAGE ORDER]	Summary B9 (round to cents)
[TOP CATEGORY]	Your Sales by category table: the highest total
[TOP REP]	Your Sales by rep table: the highest total
[BULK ORDERS]	Summary B12

Task 24 Copy the summary table into Word ★★ Building

1. In Excel, select **A15:C21** on the Summary sheet and press `Ctrl + C`.
2. In Word, select the line **[PASTE EXCEL TABLE HERE]** and delete the text, leaving the cursor on the empty line.
3. Press `Ctrl + V`. Click the small **Paste Options** box that appears and choose **Use Destination Styles**.
4. Click inside the table. On the **Table Design** tab choose a style you like, then **Layout > AutoFit > AutoFit Window**.
5. Make the Total row bold.

Task 25 Copy the chart into Word and add a caption ★★ Building

1. In Excel, click the **border** of your chart (not the title or bars) and press `Ctrl + C`.
2. In Word, delete the text **[PASTE EXCEL CHART HERE]** and press `Ctrl + V`.
3. Click the chart and press `Ctrl + E` to centre it. Drag a corner handle if it needs resizing.
4. With the chart selected, click **References > Insert Caption**. Type `: Sales by category, October 2026` after “Figure 1” and click **OK**.

Paste option	What happens
Use Destination Theme & Embed Workbook	A copy of the chart is stored inside Word. Changing Excel later does not change Word. (This is the default.)
Keep Source Formatting & Link Data	Word stays connected to the Excel file. If the numbers change in Excel, the chart in Word can update.
Picture	The chart becomes an image. It cannot be edited, but it always looks the same.

Task 26 Stretch: see linked data in action ★★★ Stretch – optional

1. Delete the chart you pasted in Word (click it and press **Delete**). Copy the chart from Excel again.
2. In Word, right-click where the chart should go and choose the paste option **Keep Source Formatting & Link Data**. Re-insert your caption if needed.
3. In Excel, change the quantity for order **BOS-1001** (cell J2) from **3** to **13**.
4. In Word, click the chart and choose **Chart Design > Refresh Data**. Watch the Furniture bar grow.
5. **Important:** change J2 back to **3** in Excel and refresh the chart again, so your report shows the correct figures.

✎ **Which other figures in your report would be wrong if you forgot to change it back?** _____

Task 27 Final checks and save as PDF ★ Foundation

1. Right-click the table of contents and choose **Update Field > Update entire table > OK**.
2. Press **F7** to run spell check one last time.
3. Scroll through the whole report. Make sure no square-bracket placeholders are left.
4. Save the Word file (`Ctrl + S`) and the Excel file.
5. In Word click **File > Export > Create PDF/XPS**, name it `Bayside_Report_YourName.pdf` and click **Publish**.

Self-check before you hand in

Tick each item when you are happy with it. Hand in three files: your Excel workbook, your Word report and the PDF.

✓	Excel workbook
☐	Headings are bold and filled, top row is frozen, columns are wide enough
☐	Dates show as dd/mm/yyyy and money columns show as Currency
☐	Product Name, Subtotal, GST, Total and Bulk Order are filled in for all 40 orders
☐	GST formulas use the locked reference `Summary!$B$3`
☐	Totals row is in row 43 with row 42 left empty
☐	Orders over $500 are highlighted
☐	Summary sheet: key figures, sales by category and sales by rep are complete, and C21 matches M43
☐	Column chart has a title and data labels

✓	Word report
☐	No spelling mistakes, and the business name reads Bayside Office Supplies everywhere
☐	Title, Subtitle, Heading 1 and Heading 2 styles are applied
☐	Goals are bulleted and Next Steps are numbered
☐	Body text is Arial 11 with 1.15 line spacing; margins are Moderate
☐	Header shows the business name; footer shows page numbers
☐	Cover page is separate, with an up-to-date table of contents
☐	All six placeholders are replaced with the correct figures
☐	The Excel table and chart are in the report, and the chart has a Figure 1 caption
☐	Saved as a Word document and exported as a PDF

Handy shortcuts

Shortcut	Works in	What it does
Ctrl + S	Word and Excel	Save
Ctrl + Z / Ctrl + Y	Word and Excel	Undo / Redo
Ctrl + C / Ctrl + V	Word and Excel	Copy / Paste
Ctrl + F / Ctrl + H	Word and Excel	Find / Find and Replace
F7	Word and Excel	Spell check
Alt + =	Excel	AutoSum
F4	Excel (while editing a formula)	Add $ signs to lock a cell reference
Ctrl + Enter	Word	Insert a page break
Ctrl + E	Word	Centre the selected text or picture

Learn calmly. Build confidence.