

Case 19-8: Excel Data — Handout 7
E-mail From Manager — Data Manipulation

From:	Manager
To:	Staff Member
Subject:	Data Manipulation Request
Attachments:	AR Open Invoice Report.xlsx (Handout 4)

Hi,

Now that you have performed the necessary data cleanup procedures and the data file is ready for use in Excel, I would like you to perform the following:

- The Accounts Receivable Open Invoice Report does not include the customer names; however, we have been given a customer key that has the customers' names by customer number. There is only one unique customer number per customer. Use the XLOOKUP formula to input the customer names into the report itself.
- Once the customer names are added, please create a PivotTable that shows the credit limit by customer name for only those customers located in Colorado. Note that each customer only has one credit limit regardless of how many invoices it has.

Thank you,