Creating an Invoice Template in Microsoft Excel 2010

- Click the Start button located on the Windows taskbar. (Bottom, left-hand corner of your computer's desktop or "home" screen)
- Scroll down to find Microsoft Office Excel 2010 & click to open the program. (The program is located within the Microsoft Office folder)
- Your screen should resemble Figure
 1.1. Now click the File button (highlighted in green, located in the top, left-hand corner of your screen).
- 4. From the displayed menu on the lefthand side, select **New**.
- Check to make sure your screen resembles figure 1.2. Under Office.Com Templates, look for and select Invoices. (Your computer will perform a brief search at Office.Com for a list of available invoice templates)
- In this tutorial we will be using a Sales Invoice template. Click on the Sales invoices Folder. (Your computer will perform another brief search at Office.Com)
- Once the new window opens, select Invoice with Tax Calculation. Refer to Figure 1.3. Click the Download button located at the bottom, right-hand side of your screen.

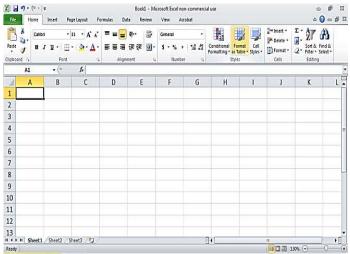
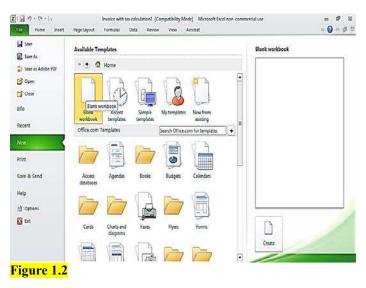
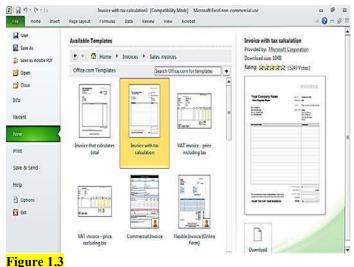


Figure 1.1





- When the template opens, select the Page Layout tab at the top of your screen. In the Sheet Options group (Figure 1.4), select the View checkbox under Gridlines. Select the View checkbox located under Headings, as well.
- 9. You can now begin entering your business's information (company name, company slogan, if applicable, business address, primary telephone number and fax number).

Note: You do not have to manually enter the current date each time you generate a new invoice. There is a function within this template that will automatically do that for you. **Once you begin generating** invoices, make sure that any item prices you enter in cells E14-E29 are correct. This template is designed to give you a subtotal as well as an overall total, once you enter your state's tax rate (cell E31). Figure 1.5 shows this information from the bottom section of the invoice.

10. When you finish entering all information regarding your business, select the File tab, then from the displayed menu, select Save As. Determine where you will save your document—your computer's hard drive, USB flash drive, etc.

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Figure 1.4

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Figure 1.5

- 11. In the File Name box, enter a name for your invoice template. (Example: Invoice_ABC123Company)
- 12. In the Save as Type box, click the down pointing arrow and from the displayed menu, select Excel Template. Click the Save button. (See Figure 1.6)
- 13. Whenever you need to generate an invoice, locate your template from whichever source you saved it.
 Open it and enter your customer's information, a brief description/item number of products sold, and the correct price for each item.
 Remember, the calculations will be done for you.
- 14. Finally, print two copies of the invoice—one for your records and one for your customer. Make sure you save each individual invoice as well by selecting the Save As button after completing each invoice. (Example:

Inv_CustLastName_CustFirstName)

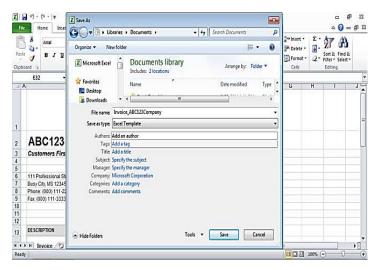


Figure 1.6