Creating an Invoice Template in Microsoft Excel 2010

1. Click the **Start** button located on the Windows taskbar. (Bottom, left-hand corner of your computer's desktop or "home" screen)
2. Scroll down to find **Microsoft Office Excel 2010** & click to open the program. (The program is located within the **Microsoft Office** folder)
3. 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 left-hand side, select **New**.
5. 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)
6. 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)
7. 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.
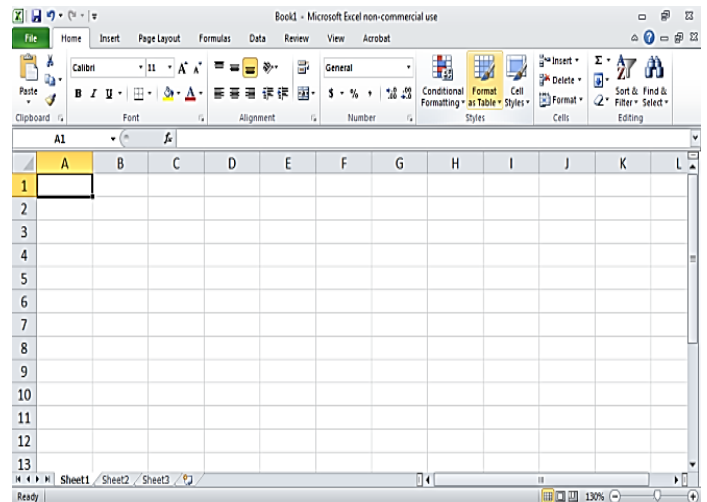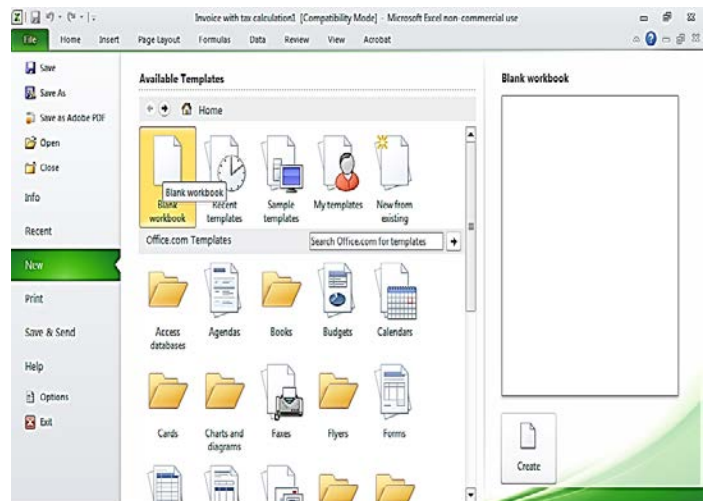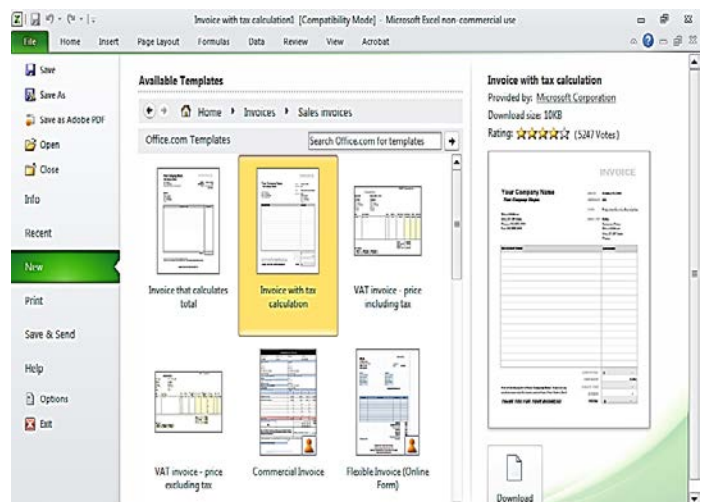

Figure 1.1

Figure 1.2

Figure 1.3

8. 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.
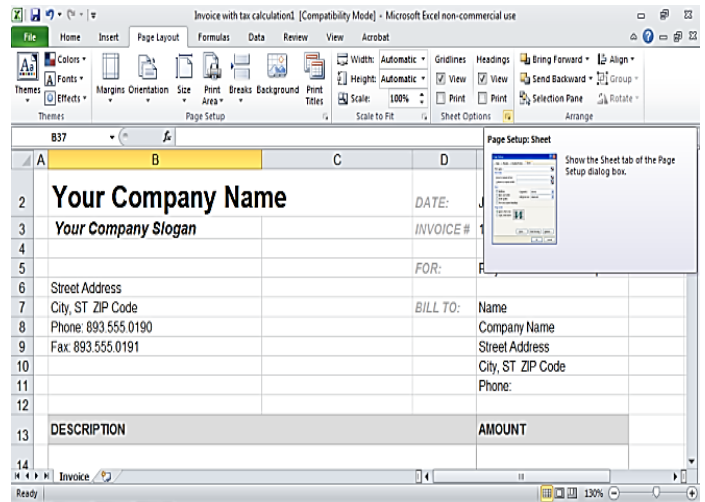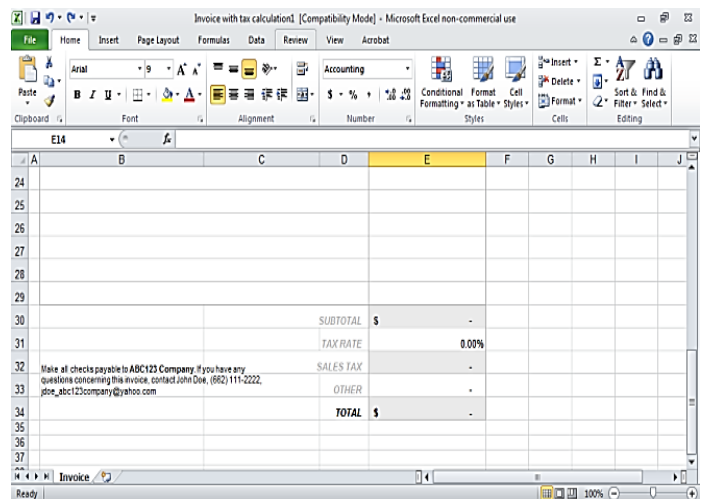

Figure 1.4

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)
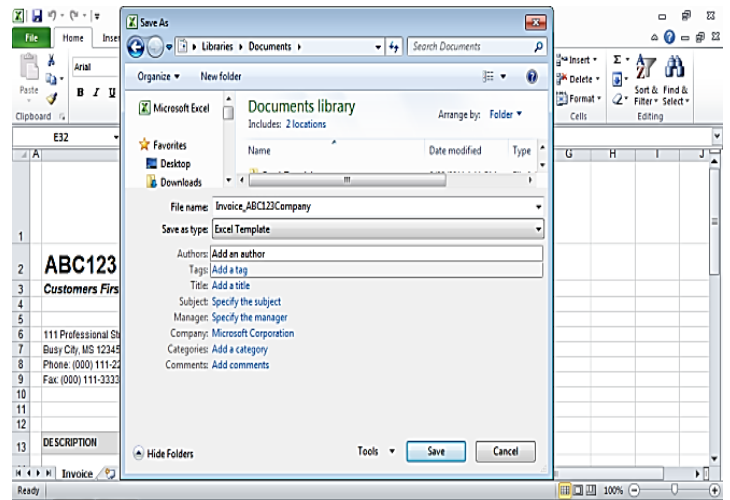

Figure 1.6