

How to Create a Purchase Order in Excel

In a typical business transaction, especially one that involves buying and selling, a purchase order is an essential document that serves as the preliminary step in a sale. In other words, it is the proverbial handshake that kicks off a business transaction. It's important to note that the fundamental difference between an invoice and a purchase order is that the former is issued by the seller. A purchase order is created by the buyer with the intent to engage the services of the seller. But for the purpose of this tutorial, an invoice template can be used as a reference guide to customize your own purchase order. Using Microsoft Excel can help you draft a purchase order that's quick and easy! The guide below is generally applicable to most recent Excel versions, for both Windows and Mac users.

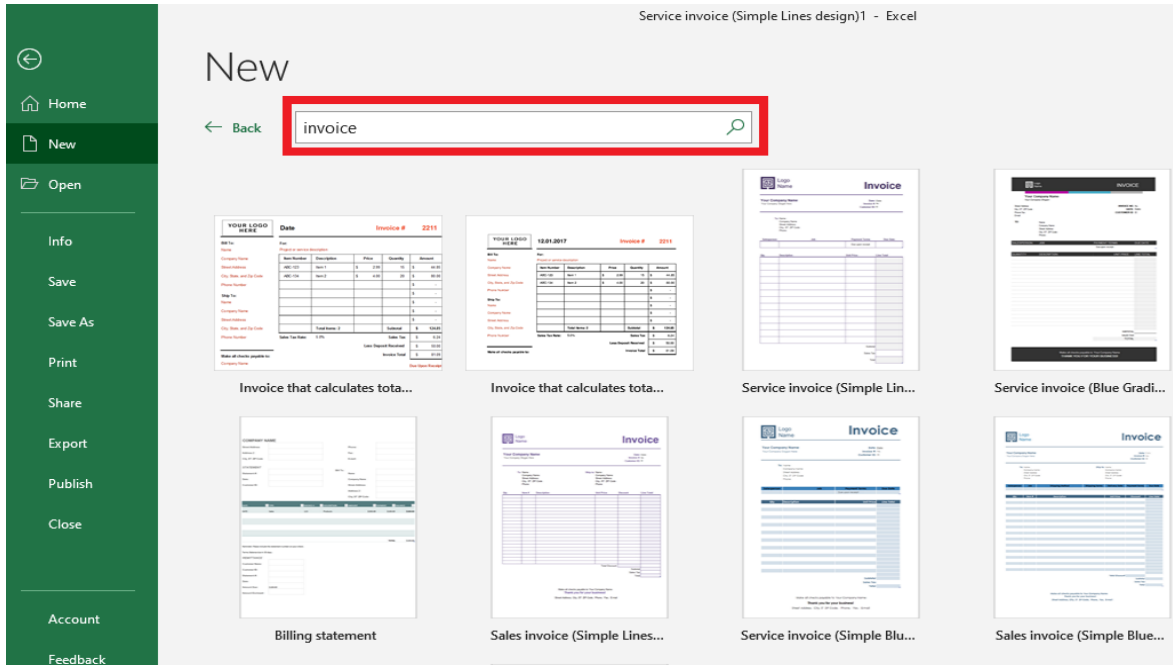
SUMMARY:

- For Windows: Click on **New**, then type in **Invoice** in the search bar. Choose an invoice template to customize into a purchase order. Click **Create**.
- For Mac: Go to **New** and type **Invoice** in the search bar. Pick a template to edit, then select **Create**.

How to Make a Purchase Order Using Templates in Microsoft Excel

Follow the step-by-step guide below on how to create a basic purchase order using ready-made Microsoft Excel templates.

1. Open Microsoft Excel and select **New** from the menu on the left. Type in 'invoice' using the search bar to browse the available templates.



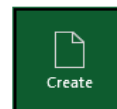
2. There are no purchase order templates on Excel; but since its format is similar to that of a service invoice, you can use that as your template. Click **Create** once you've found a suitable template.

The image shows a detailed view of a service invoice template. It includes a logo and company name at the top left, and the word 'Invoice' in a large font at the top right. Below this, there are fields for 'Your Company Name', 'Date', 'Invoice #', and 'Customer ID'. A section for 'To:' contains fields for Name, Company Name, Street Address, City, ST, ZIP Code, and Phone. Below this is a table with columns for 'Salesperson', 'Job', 'Payment Terms', and 'Due Date'. The main body of the invoice is a table with columns for 'Qty', 'Description', 'Unit Price', and 'Line Total'. At the bottom right, there are fields for 'Subtotal', 'Sales Tax', and 'Total'.

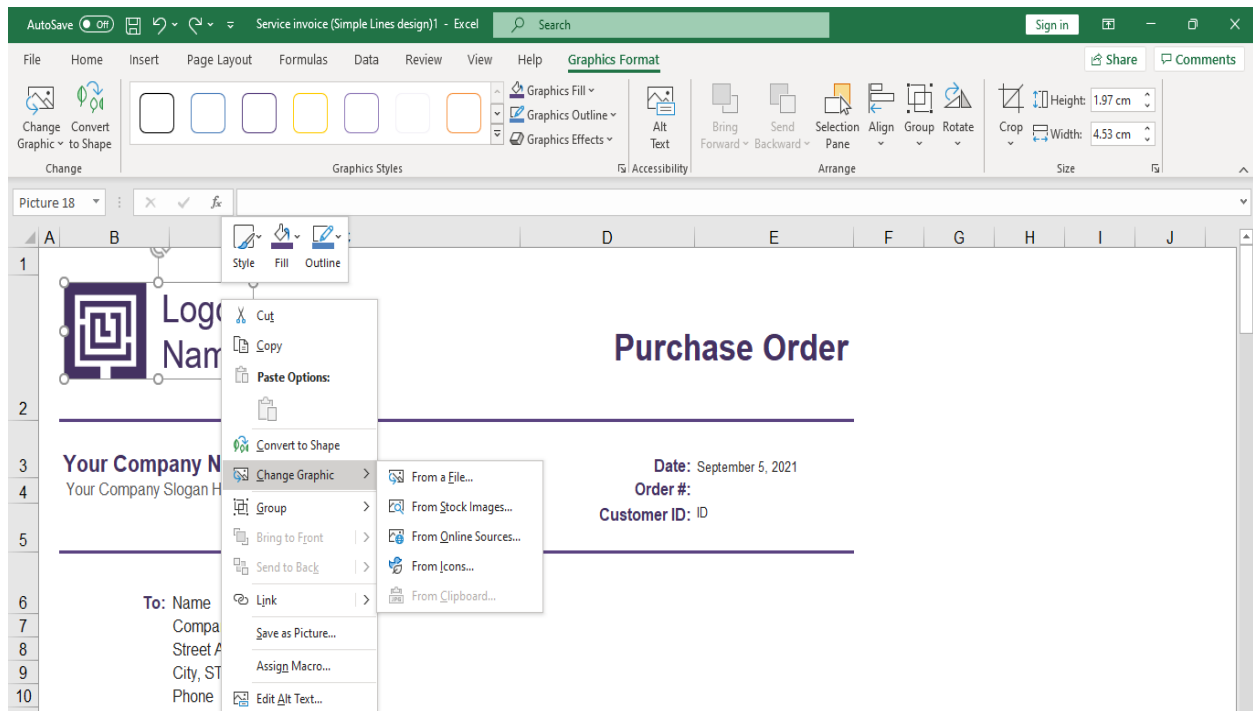
Service invoice (Simple Lines design)

Provided by: [Microsoft Corporation](#)

Add your company's logo and slogan to invoices you send out with this accessible service invoice template. This professionally designed service invoice template features a soft line design with a table to list items and totals. Create a stunning invoice for your company or side business using this simple Excel service invoice template.

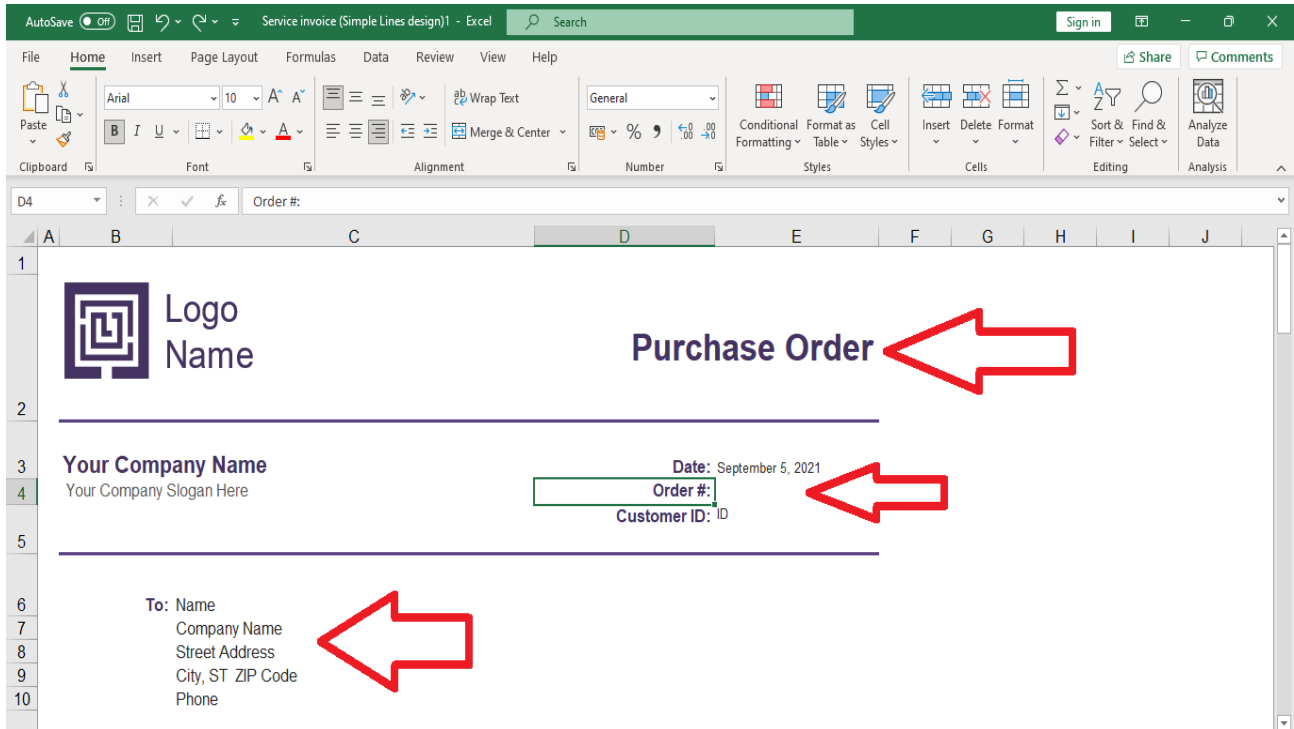


3. In the particular template below, you can customize the logo and replace it with your own company logo. Simply select the element and right click. Select **Change Graphic** to upload an image from your computer or other sources.



Note: If you want to check out more sample [purchase orders in Excel format](#), Template.net has dozens of editable and downloadable templates.

4. Change the word Invoice to **Purchase Order** as the title on the upper right corner. Insert your company name, date, order number, and customer ID. Below the date, change *Invoice #* to *Order #*. You also have the option to remove the customer ID if it's unnecessary.



5. A purchase order is issued or billed to the seller, so make sure to indicate the contact information of the seller. State the point person's name, company name, complete address, phone numbers, and email address.

6. Place all order details in an organized table. The basic elements included in the table are usually the quantity, item description, unit price, and total amount. Breakdown each item specifically. You may also insert a couple of terms and conditions at the bottom of the table. But keep it short and straight to the point.

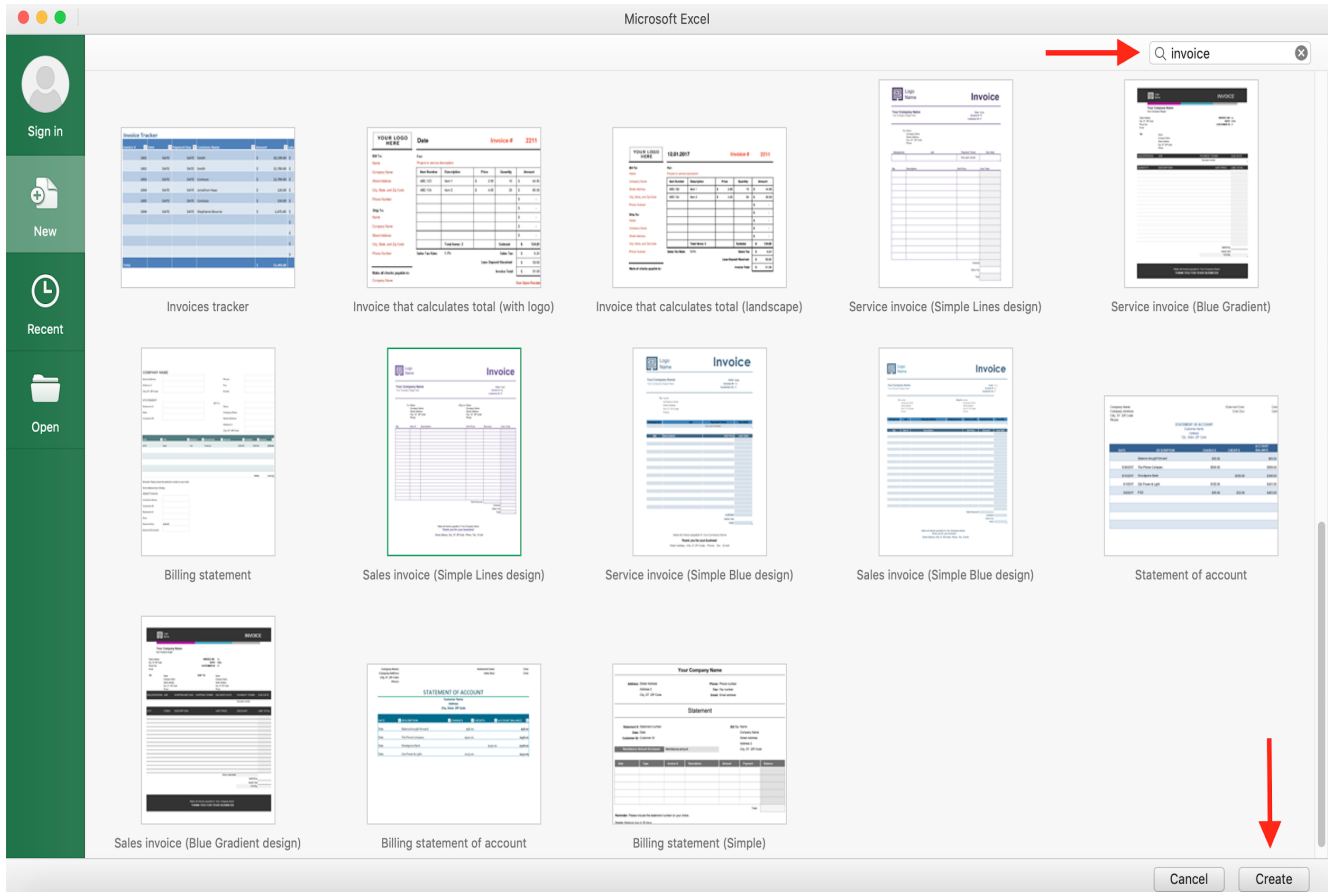
Qty	Description	Unit Price	Line Total
1.00	Tiles	\$ 65.00	\$ 65.00
2.00	Glass	100.00	200.00
Terms and Conditions:		Subtotal	\$ 265.00
		Sales Tax	
		Total	\$ 265.00

7. Save the file when you're done editing. You can print the purchase order or email it directly to the seller or vendor.

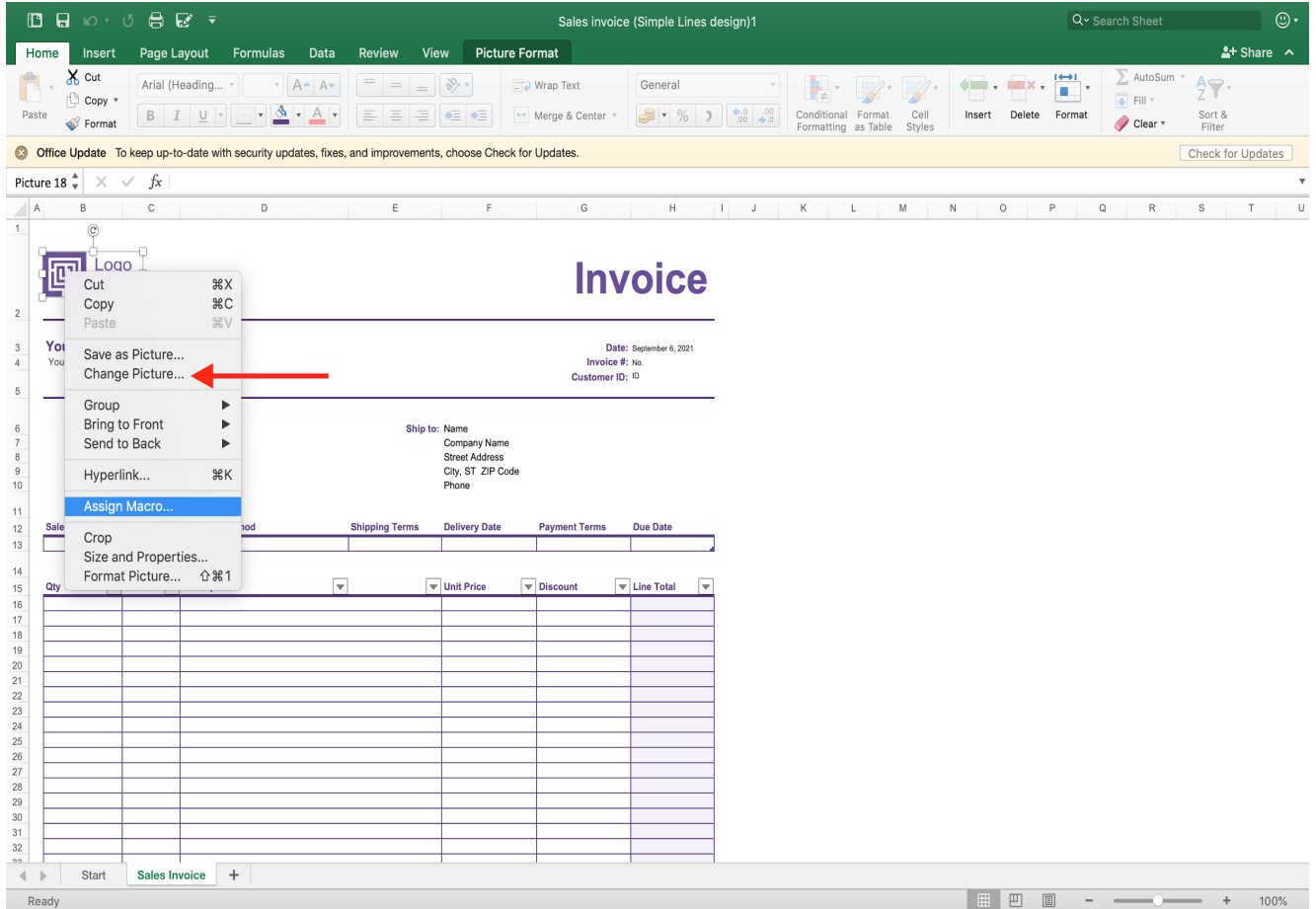
How to Create a Purchase Order for Mac Using Microsoft Excel

For Mac users, you can use the same templates to customize your own purchase order too. Just follow the basic instructions below to get started. This tutorial applies to most Excel versions- including MS Excel for Mac 2011 and MS Excel for Mac 2016.

1. Open Microsoft Excel and start by clicking the **New** document icon on the left. Type 'invoice' into the search bar. Choose a template and hit **Create**.



2. To create a purchase order, you can just apply minor changes to an existing invoice template. You can change the logo or image on the upper left part of the form. Select the element and right click, as seen below. Click **Change Picture** to replace the logo.



3. Click the cell to change the name from invoice to **Purchase Order**. Insert your company name and other key details. Be sure to change *Invoice #* to *Order #*.

