How to Create a Report in Excel

Reports are supposed to make information sharing more efficient and convenient. They are useful in most scenarios, especially in business and finance. Budgeting involves coming up with income and expense reports. Project management requires furnishing a series of reports and other documents. Creating a report can sometimes be a daunting task. But thankfully, programs like Microsoft Excel come with ready-made templates to help make the task a little easier. The tutorial below offers a quick guide on how to create your own report for both your personal and business needs.

SUMMARY:

- For Windows: Click the **New** document icon. Browse the available templates by typing **Report** in the search bar. Choose a template and click **Create**.
- For Mac: Go to **New**, and type **Report** in the search bar. Pick a template and select **Create**.

How to Make a Report Using Templates in Microsoft Excel

There are all kinds of reports, with sales reports and expense reports as some of the most common. This simple tutorial will guide you in creating a report for all your business needs. Save more time and energy by taking advantage of the ready-to-use templates on Microsoft Excel.

1. Open the Microsoft Excel, then select **New**. In the search bar, type in 'report' to display all the available templates.
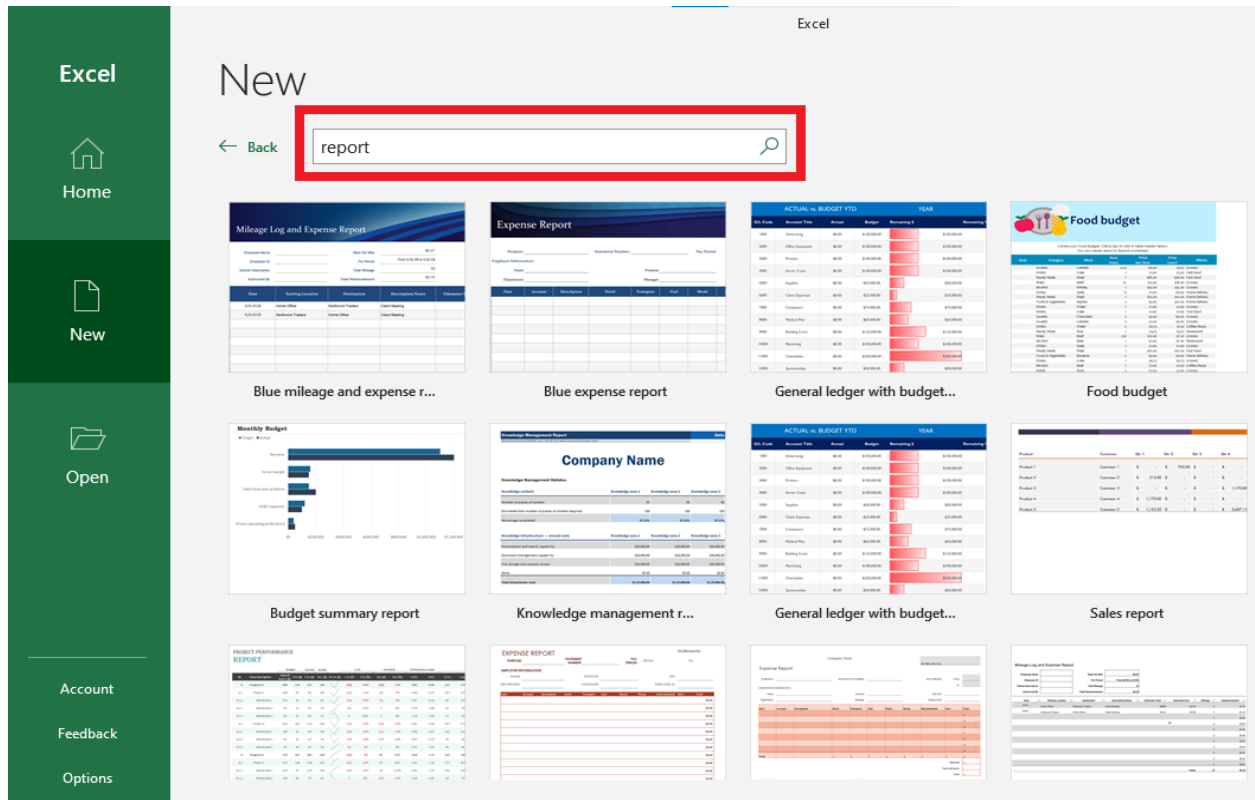
2. Choose a report template and click **Create**.

Sales report

Provided by: Microsoft Corporation

Monitor your customers and products with this accessible sales report for Excel. Each quarter is broken out within this sales report template. Create a professional sales report that includes space for product descriptions and customer names.

Download size: 30 KB

Create

3. Keep or change the title of the report. The sample below is a detailed travel expense report. To edit, start by indicating your complete name, department, period date, and other key details. Click the cell to change the text inside.

4. In the table, customize the date and description for each expense. Specific costs such as meals, lodging and transportation are indicated in the column header. You may opt to add or remove columns, whatever your preference is. Input all the respective expenses, and the table will automatically calculate the total for each row and column.

5. Save your Excel file once you're done editing. You can choose to print out or share your report to others.

Note: If you are looking for a wider variety of templates, feel free to browse Template.net for dozens of free Excel schedule templates and designs.

How to Create a Report for Mac Using Microsoft Excel

Mac users can also customize their own report with the use of an Excel template. Just follow the basic steps below to get started!

1. On the menu bar located on the left, select **New**. Type in 'report', then pick a template and select **Create.**
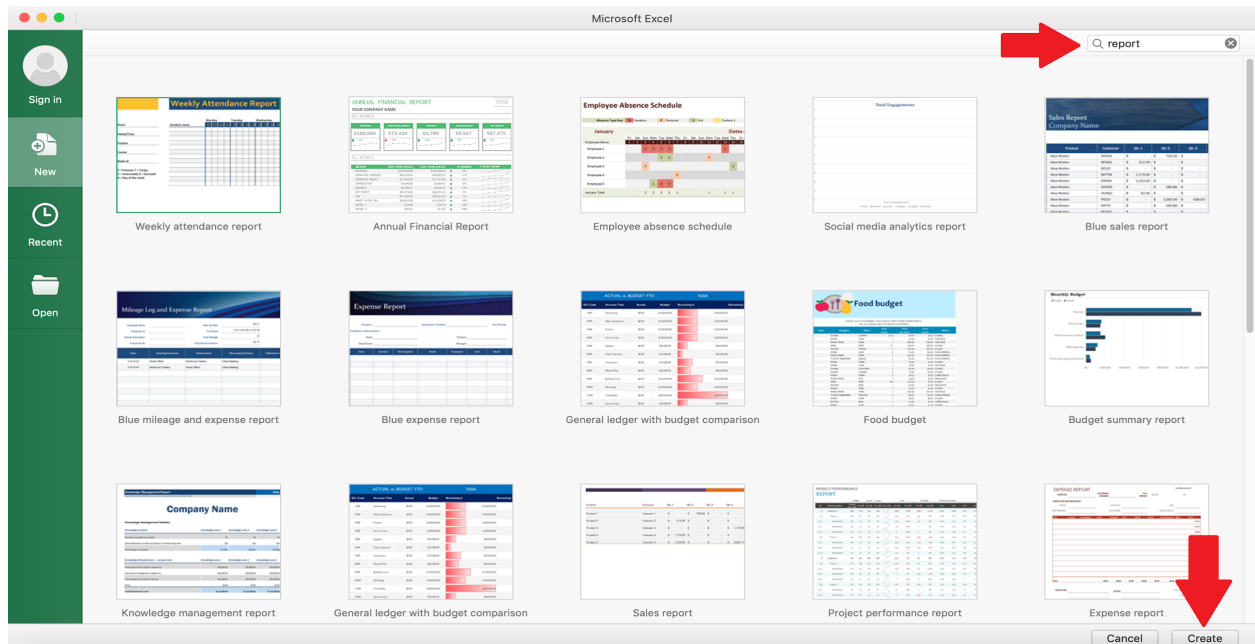
2. Edit the title and input other key data, as needed. You can customize the text font, size, and color as well. The sample template below is a weekly sales report.

3. Edit the table by inputting all the corresponding values. You can also change the column titles as you see fit. Then indicate all sales amounts for each day of the week. The total value is automatically adjusted whenever you change the numbers.

4. Save your Excel file after editing. You can either print out the report or share it with your contacts.