

How to Make an Invoice in Excel

Invoices play a critical role in accounting either for company revenue or spending. Whether you provide materials or services to clients or you purchase them, invoices are important documents that require documentation. If your company chooses to use a free invoice template or an invoice generator, it must follow the correct format. There are invoices online that you can utilize, including proforma invoices for your company. The article below presents helpful steps on how to make an invoice using an invoice template in Excel. Continue to read on!

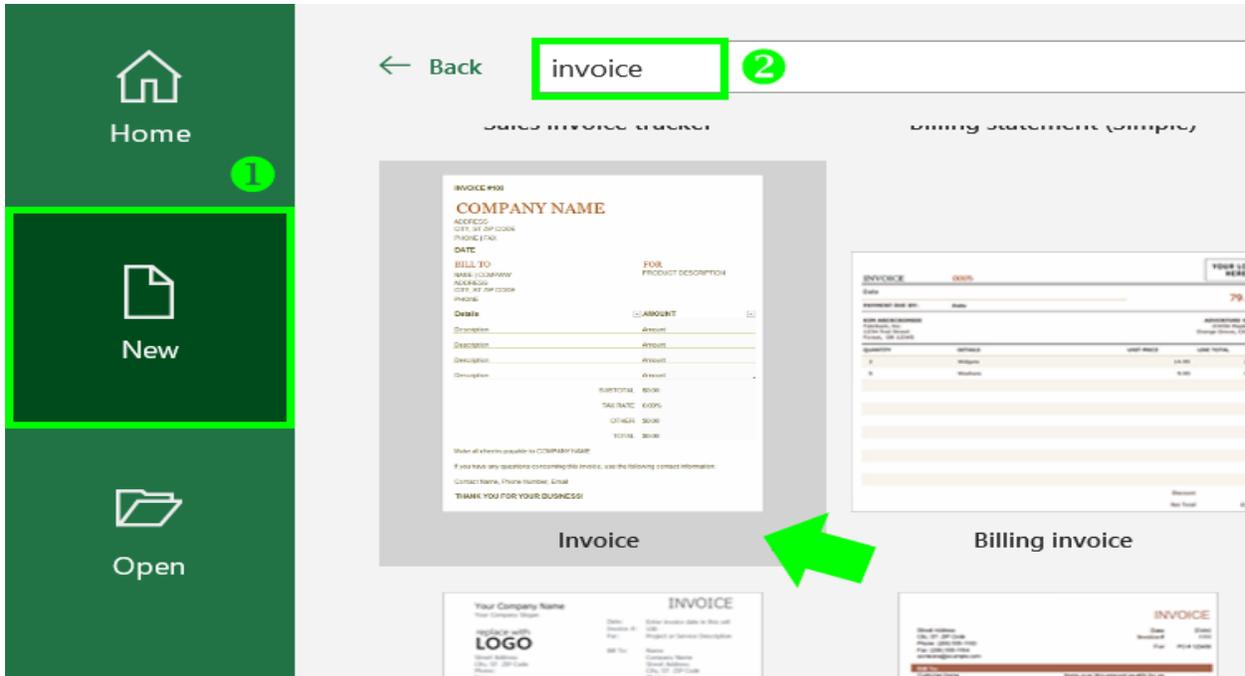
SUMMARY:

- Using Windows: Startup your Microsoft Excel and click on **New**. On the search bar, type in "Invoice" to search the available templates. Click on the invoice template you want to use and select **Create**.
- Using Mac: Click on the **File** menu after the Microsoft Excel Window opens. Under the menu option, select **New from Template**, and a selection of templates will appear. Look for the Invoice category, select your template, and hit **Create**.

How to Make an Invoice Using Templates in Excel

Excel is a valuable accounting tool that helps you manage your business's day-to-day operations. You can also use it to provide certain documents to your client as needed. Read the guide below to help you maneuver making an invoice using a template in Excel.

1. Start working on your document by clicking on **New** after the Excel window opens.
2. Type the word "Invoice" on the search bar, then press **Enter**. The action shows the available templates, and you can select the invoice you want to use.



3. After selecting your template by left-clicking on it, a window will appear showing a brief description of the document. Click on **Create** to start working on the invoice.

INVOICE #100

COMPANY NAME

ADDRESS
CITY, ST ZIP CODE
PHONE | FAX

DATE

BILL TO
NAME | COMPANY
ADDRESS
CITY, ST ZIP CODE
PHONE

FOR
PRODUCT DESCRIPTION

Details	AMOUNT
Description	Amount

SUBTOTAL \$0.00
TAX RATE 0.00%
OTHER \$0.00

Invoice

Provided by: Microsoft Corpora

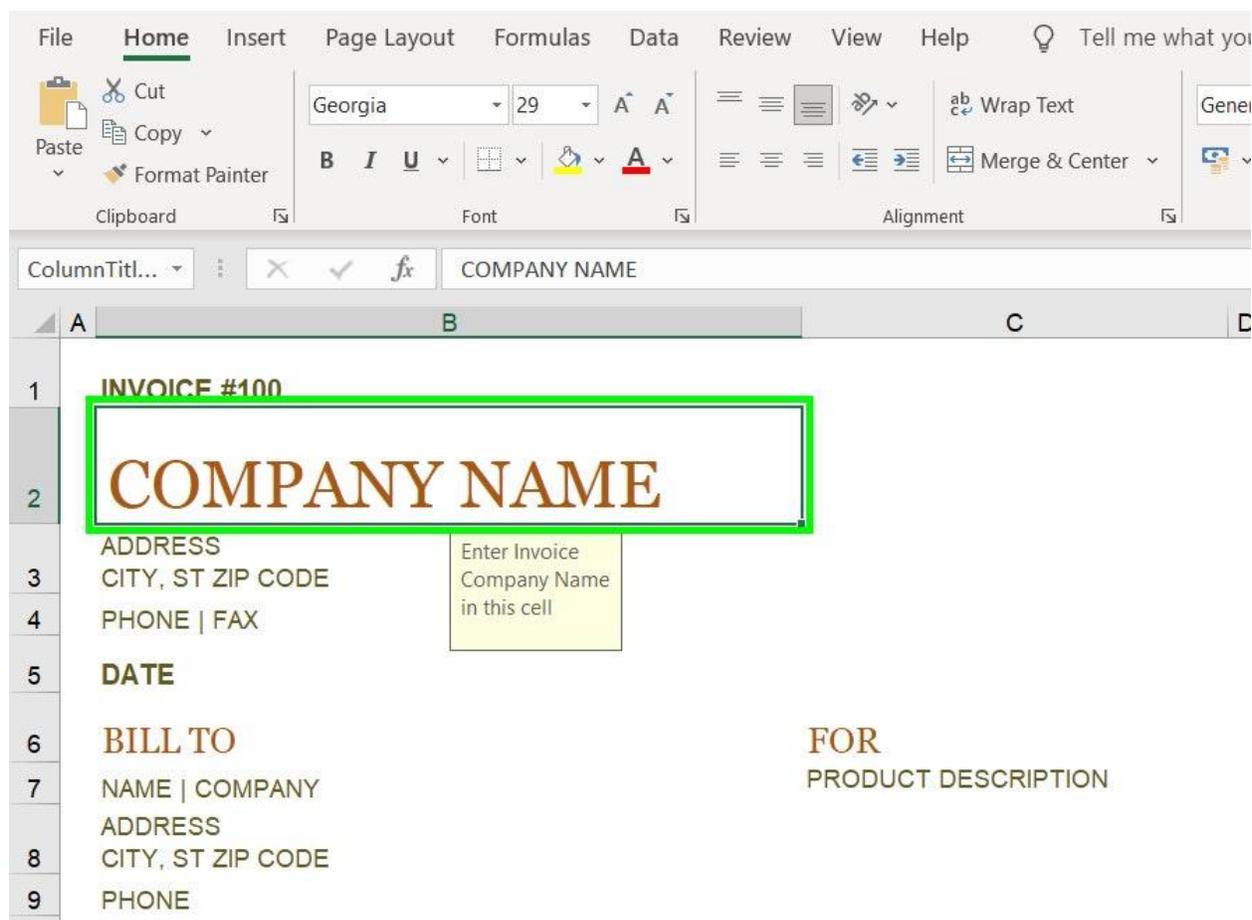
Give your receipt statement a professional appearance with this invoice template. This invoice template details all the important information and invoice details. The invoice template includes contact information and space for your logo.

Download size: 22 KB



Note: There are plenty of available templates on the web, and you can view more [invoice templates for Microsoft Excel](#) through browsing Template.net and its wide array of templates.

4. You can now edit the contents of your invoice. You can start by changing the dummy text for the company name, replacing it with the name of your business. Also, edit the company address and contact information. Above the company name, change the invoice number as necessary when sending or printing a copy.



5. Other information, like the product description and the client's billing address, is also editable. Remember to change its content as necessary.

6. The template already contains the functions to calculate the amounts. All that is left is to enter the prices, tax rates, and other costs to compute the Subtotal and total amount.

AMOUNT	
Amount	
Amount	
Amount	
Amount	
SUBTOTAL	\$0.00
TAX RATE	0.00%
OTHER	\$0.00
TOTAL	\$0.00

Enter Amount in this column under this heading for each description in column B. Enter Tax Rate & any Other cost in cell below the table to calculate Subtotal and Total amount

PANY NAME

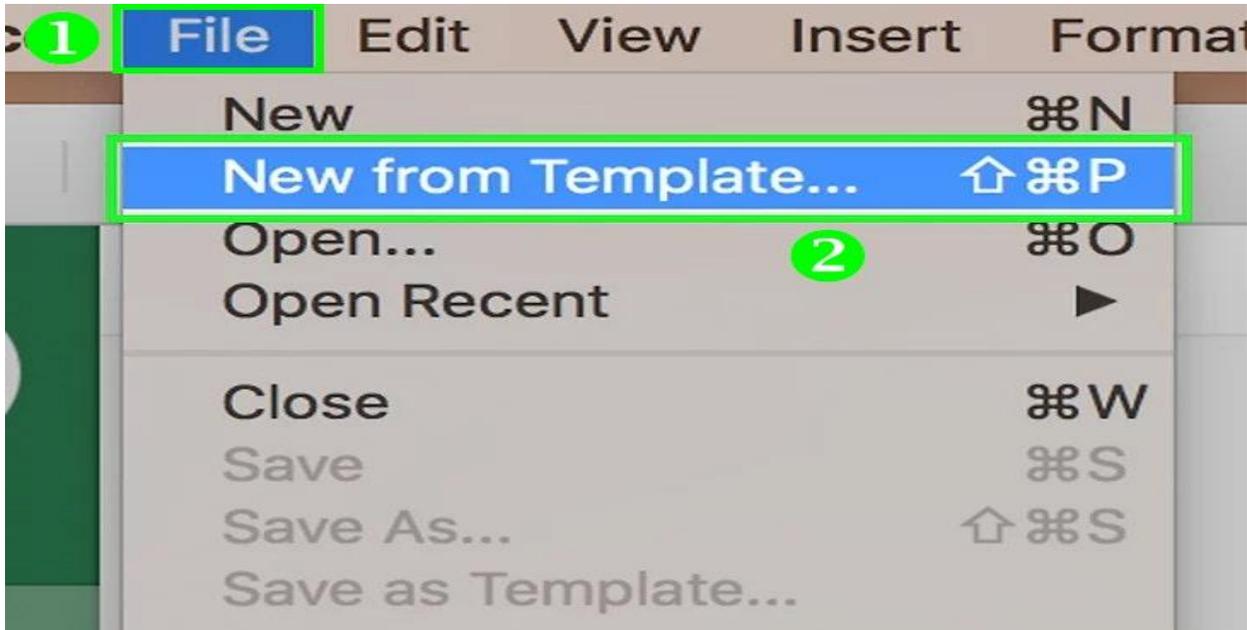
ning this invoice, use the following contact information:

7. Make the necessary changes you made for your invoice. Afterwards, you can print or send your invoices to your customers.

How to Make an Invoice Using Mac

Microsoft Office is still widely used even in Mac computers. It's efficient and easy to use. By following the guide below, you can work on your invoices by using Excel on Mac.

1. After opening your Excel program, click on the **File** menu. Search and select the **New from Template** option.



2. A window will pop up containing various templates. Search for "Invoice" on the search bar to view available templates on Office. After which, select your chosen template and click **Create** to start working on it.



3. You can now edit the contents of your template by replacing the dummy text with your company's name, address, and contact information.

4. Remember to change the billing information, product descriptions, and most importantly, input the amounts of purchased items or services.