Creating Sales Invoices

Spreadsheets have many business applications and this chapter will look at one of their most important uses. Many businesses create their own invoices (sales documents) and Microsoft Excel provides a medium for creating professional invoices, even linking them to a stock inventory.

Entering the Labels of the Invoice

1   Load Excel or start a NEW WORKBOOK and set the following initial formats:

- Widen COLUMN C to 26 characters.
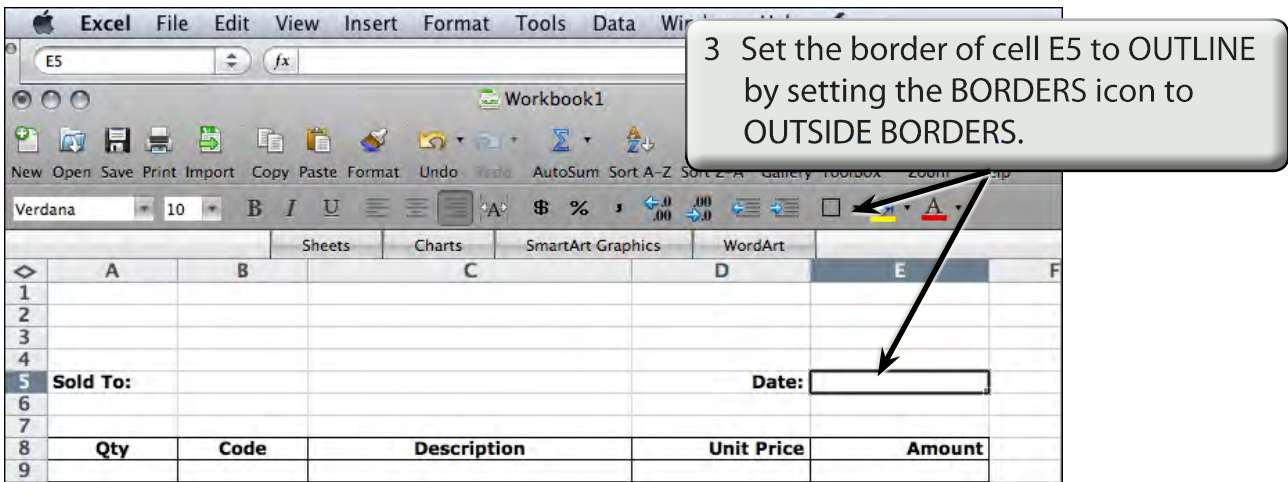
- Widen COLUMNS D and E to 14 characters.

2 Enter the labels shown in the indicated cells.

3 Change each heading to BOLD. Remember, you can hold down the COMMAND key to select multiple cells.

4 CENTRE cells A8 to C8 and RIGHT ALIGN cells D5 to E18.

Adding Borders

Borders need to be placed around relevant sections of the invoice.

1 Highlight cells A8 to E15 then click on the arrow next to the BORDERS icon in the FORMATTING Toolbar and select ALL BORDERS.

2 Highlight cells D16 to E18 and set their BORDERS to ALL BORDERS by clicking on the BORDERS icon.

3 Set the border of cell E5 to OUTLINE by setting the BORDERS icon to OUTSIDE BORDERS.

Shading the Table Headings

Highlight cells A8 to E8 then click on the arrow next to the FILL COLOUR icon in the FORMATTING Toolbar and select a LIGHT BLUE colour.
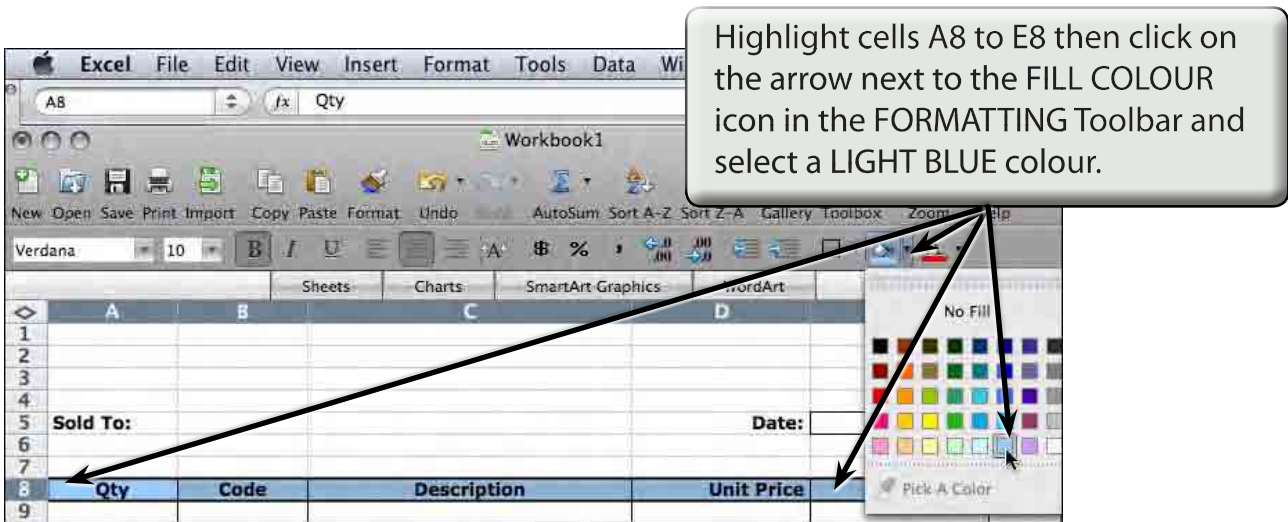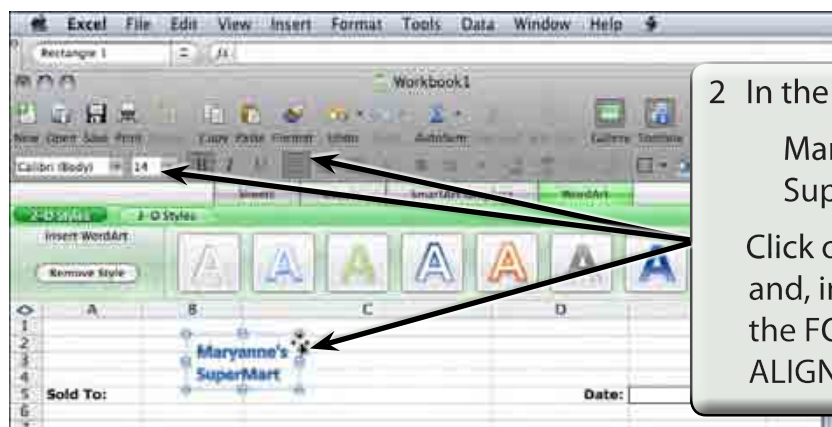
Creating the Company Title

The company's name needs to stand out from the rest of the invoice, although it should not be too overbearing. We will use WordArt in this case. We could also include a graphic or create a company logo.
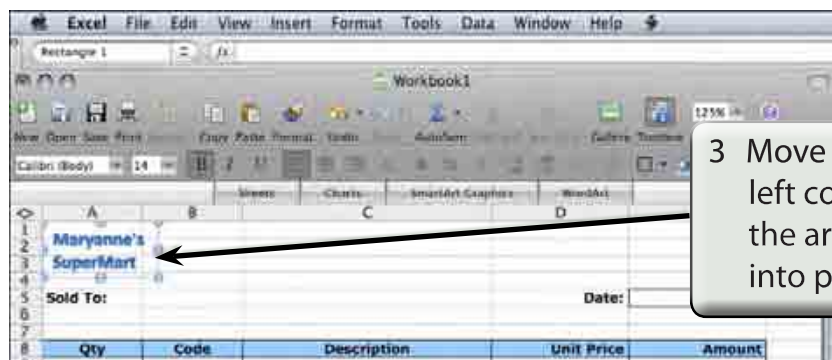
1 Open the WORDART tab of the ELEMENTS GALLERY and select a blue style.

2 In the WordArt frame enter:

    Maryanne's   <return>
    SuperMart

   Click on the WordArt frame's border and, in the FORMATTING Toolbar, set the FONT SIZE to 14 point and the ALIGNMENT to LEFT.

NOTE: **You can add some WordArt Effects and Styles to the text if you wish.**
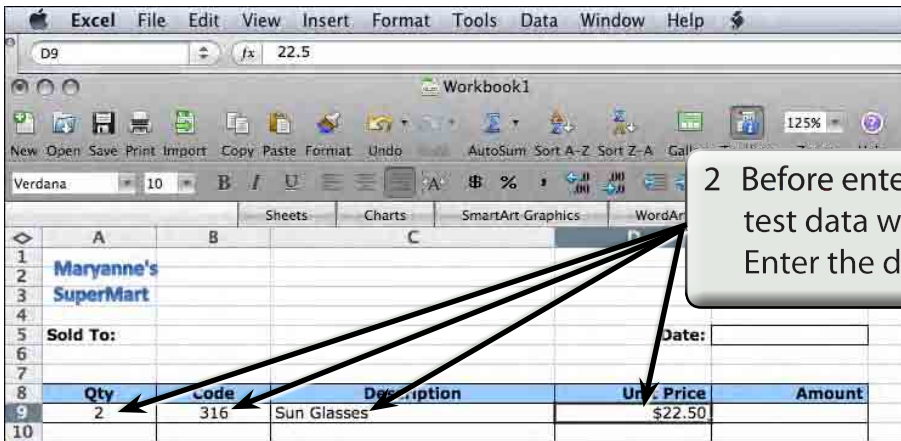

3 Move the WordArt text to the top left corner of the sheet. You can use the arrow keys to nudge the text into place.

Entering the Calculations

To complete the invoice we need to enter some formulas so that calculations can be conducted by the invoice.

A   Initial Settings

1   Carry out the following formats:

- Cells A9 to B15 to CENTRE.

- Cells D9 to E18 to CURRENCY with 2 decimal places.

2 Before entering the formulas some test data will need to be entered. Enter the data in the indicated cells.

B   Calculating the Amount

The AMOUNT is the UNIT PRICE times the QTY, but we don't want anything displayed until an item is entered. An IF formula can be used to achieve this.

1 Position the cursor at cell E9 and enter:

= IF(B9<>"",A9*D9,0)