

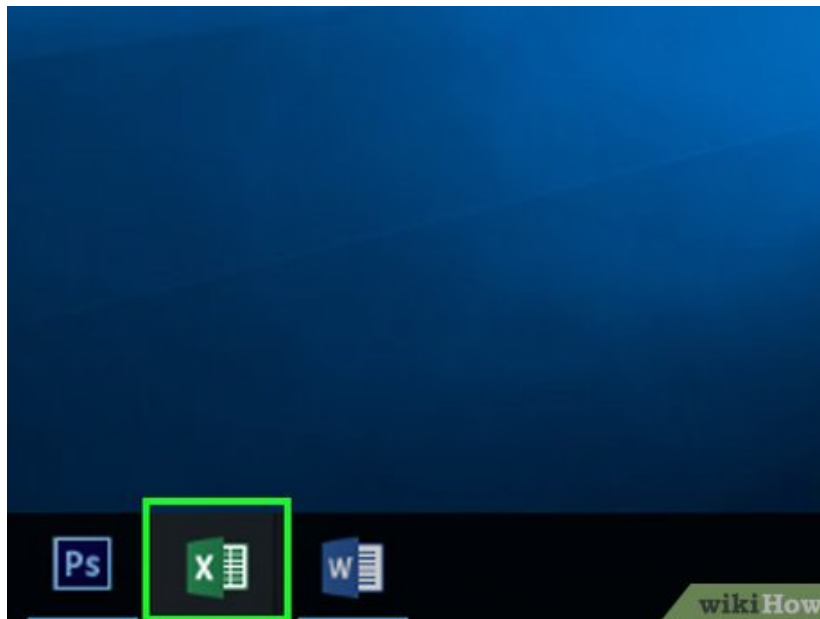
# How to Make an Invoice on Excel

This wikiHow teaches you how to create a business invoice in Microsoft Excel for both Windows and Mac computers. You can create an invoice manually, or you can select an invoice template. Open Microsoft Excel. It's a green icon with a...

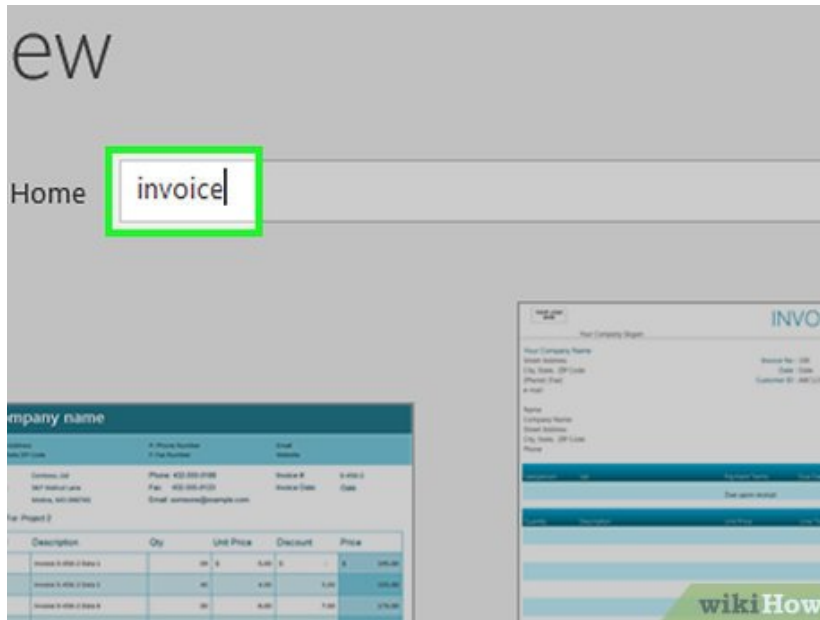
Method 1 of 3:

## Using a Template on Windows

1.



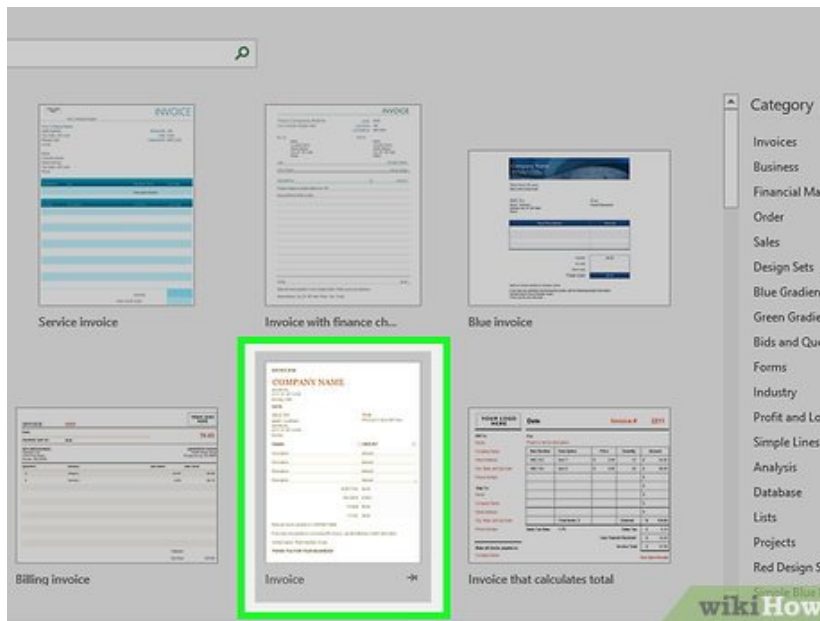
**Open Microsoft Excel.** It's a green icon with a white "X" on it. The Microsoft Excel home page will open.



2.

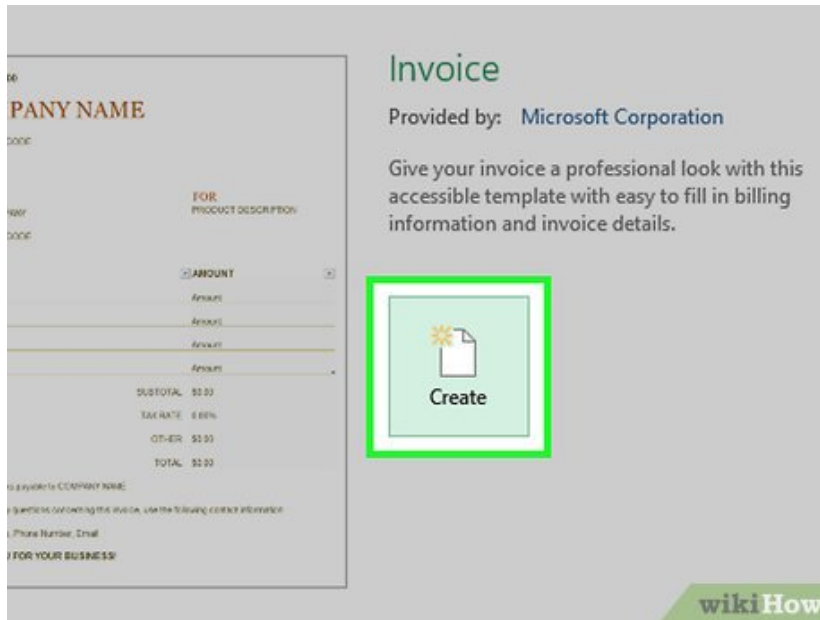
**Search for an invoice template.** Type `invoice` into the search bar at the top of the page, then press `Enter` to search for invoice templates.

1. You must be connected to the Internet in order to search for templates.



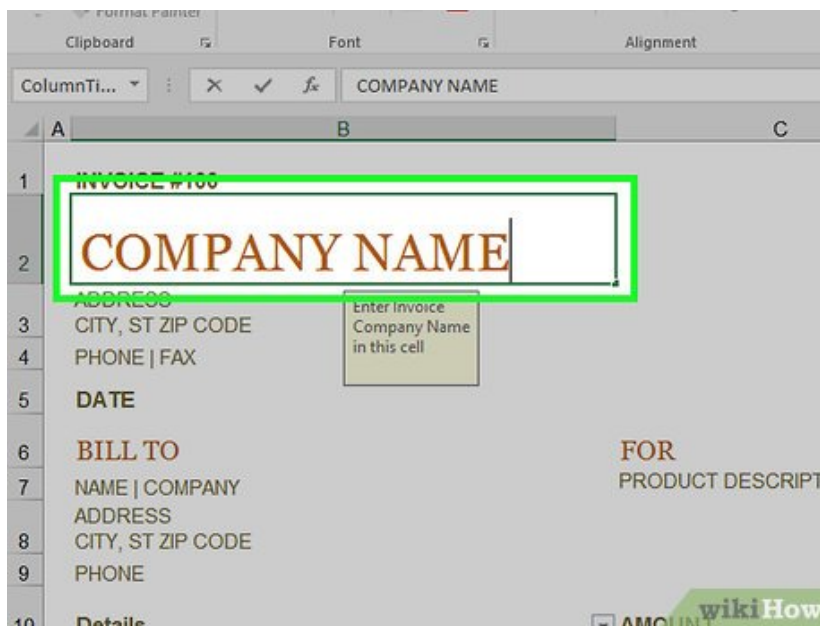
3.

**Select a template.** Click a template that you want to use to open it in a window.



4.

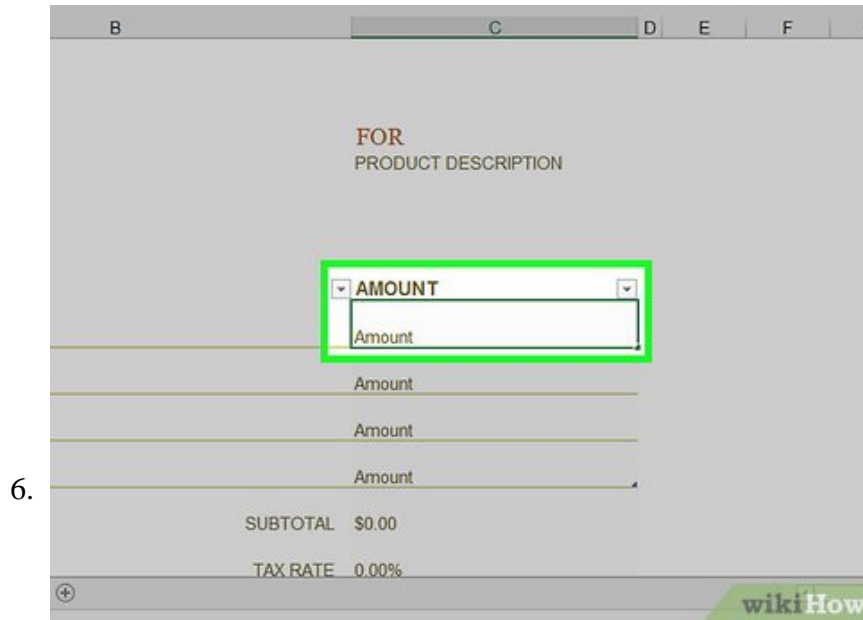
Click **Create**. This button is to the right of the template's preview. Doing so will open the template in Microsoft Excel.



5.

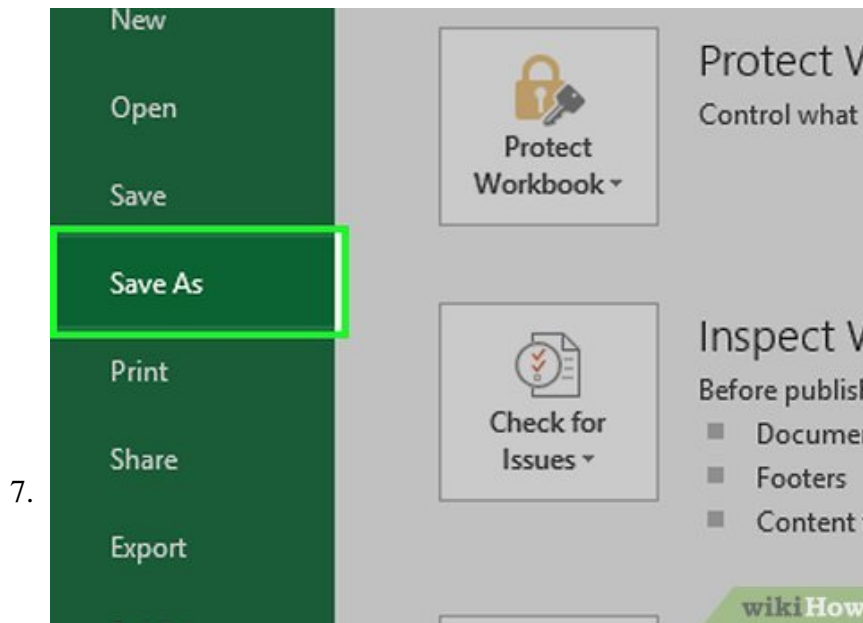
**Edit the template to fit your needs.** For example, most templates have "Company" written across the top; you would replace this heading with your company's name.

1. To edit text on the Excel document, double-click the text item, then remove the text item or replace it with your own.



**Fill out the invoice.** Enter any information required by your invoice template to ensure that the final total matches what you're owed.

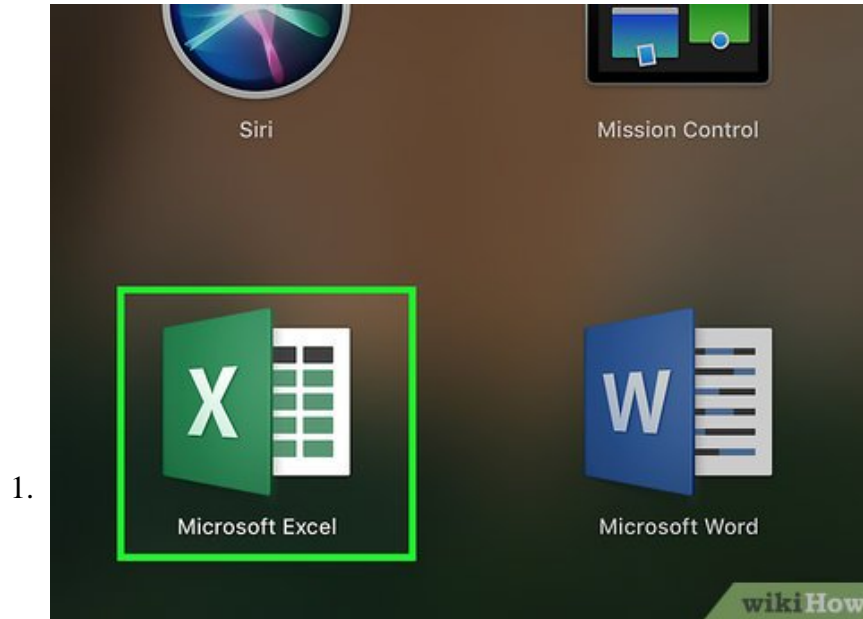
1. For example, some invoice templates will require you to enter an hourly rate or a fixed charge.
2. Most invoice templates use formulas to combine your entered hourly and the number of hours worked in the "Final Total" box.



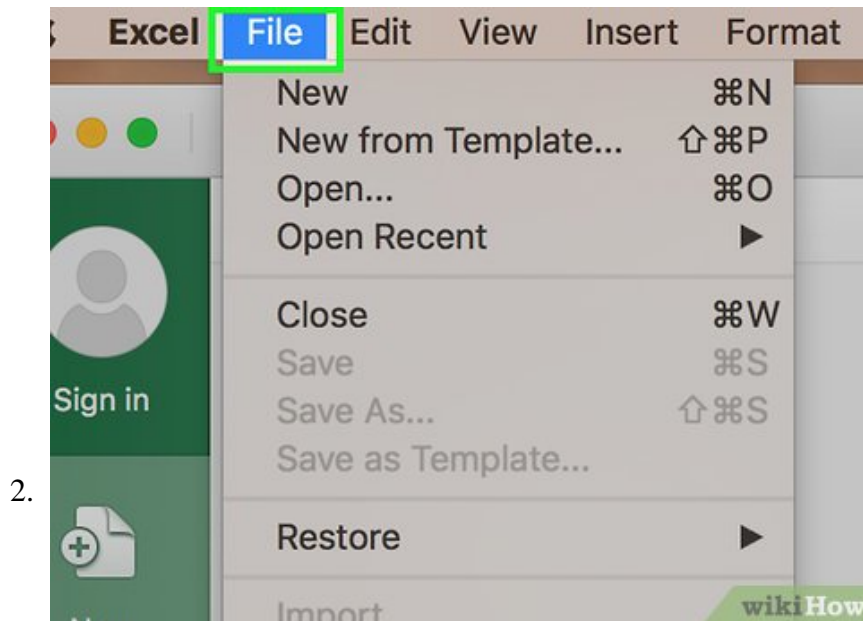
**Save your invoice.** Click **File** in the upper-left side of the page, click **Save As**, double-click a save location, enter your invoice's name, and click **Save**. This will save your customized invoice in your selected save location. Your invoice is now ready to be sent.

Method 2 of 3:

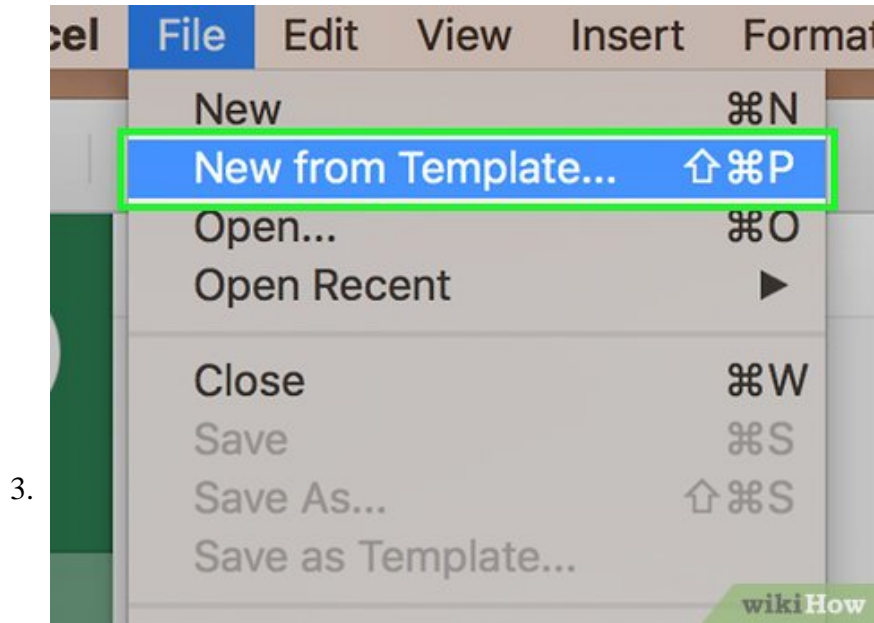
## Using a Template on Mac



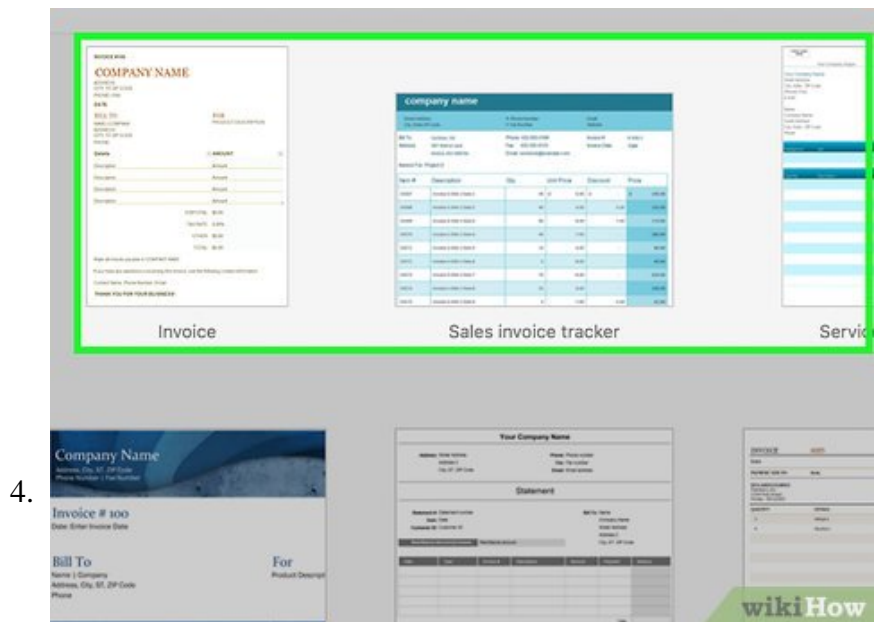
**Open Microsoft Excel.** It's a green box with a white "X" on it. Excel will open.



**Click** **File**. This menu item is in the top-left side of the page. A drop-down menu will appear below it.



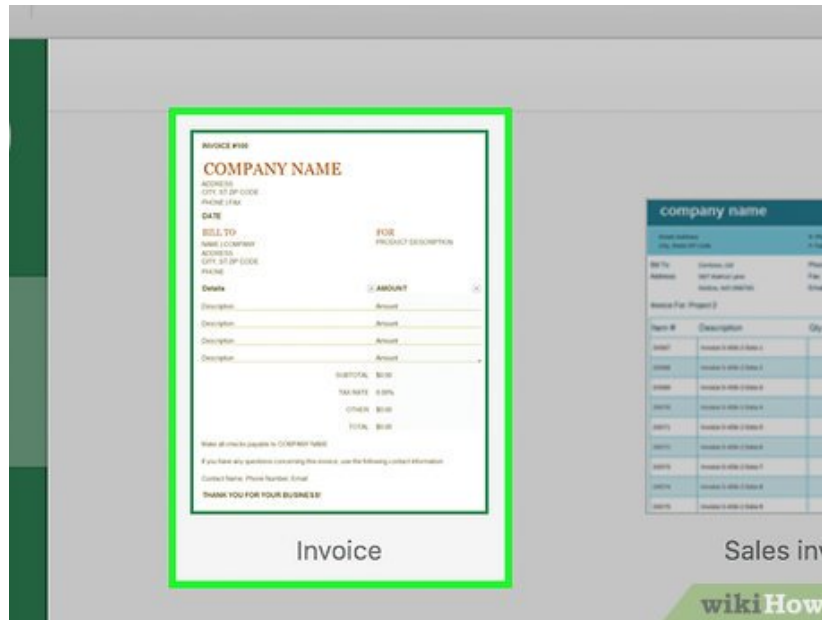
Click **New from Template**. It's an option in the **File** drop-down menu. Doing so opens a new page with template options.



**Search for an invoice template.** Type `invoice` into the search bar in the top-right corner of the page, then press `? Return`.

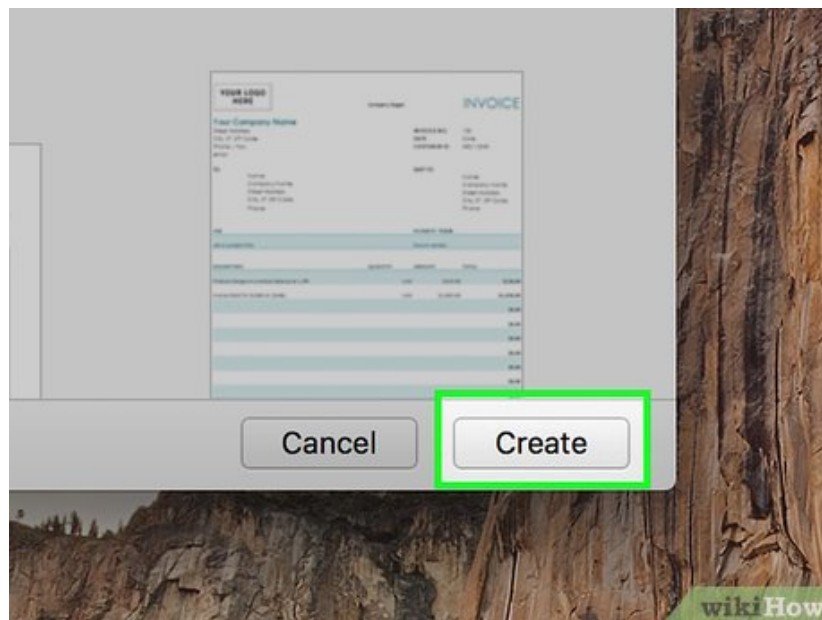
1. You must be connected to the Internet in order to search for templates.

5.



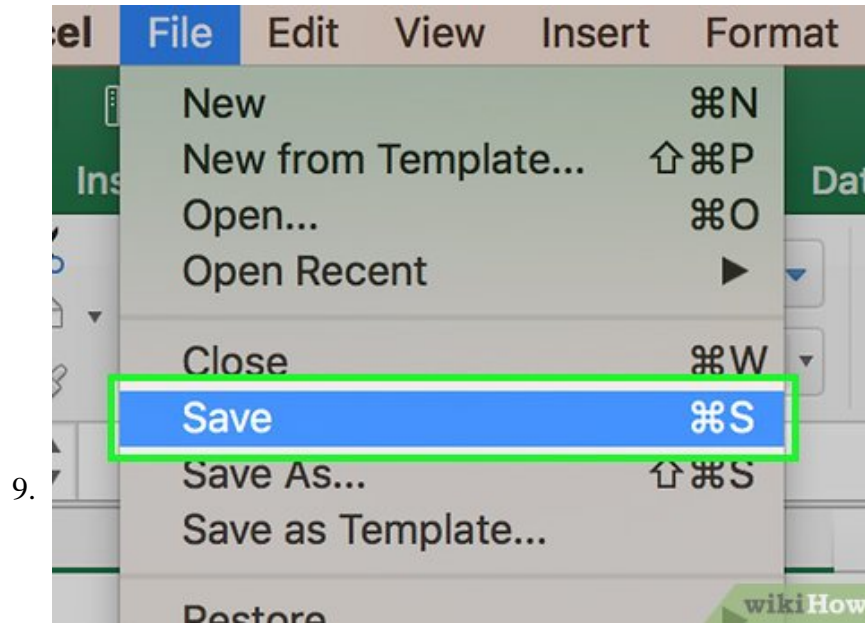
**Select a template.** Click a template to open a preview window with the template displayed.

6.



Click **Open**. It's in the preview window. This will open the invoice template as a new document.

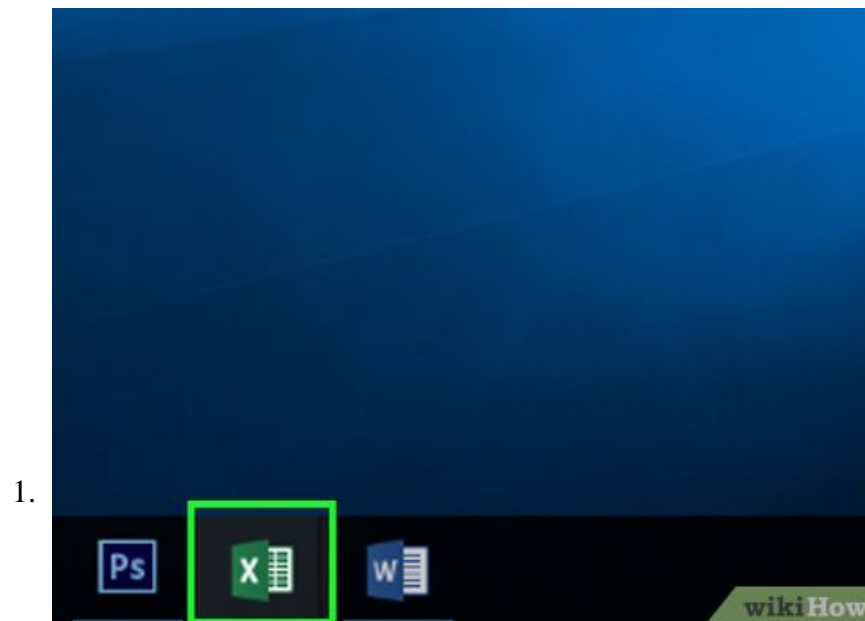




**Save your invoice.** Click the **File** menu item, click **Save As**, enter a name for your invoice, and click **Save**. Your invoice is now ready to be sent.

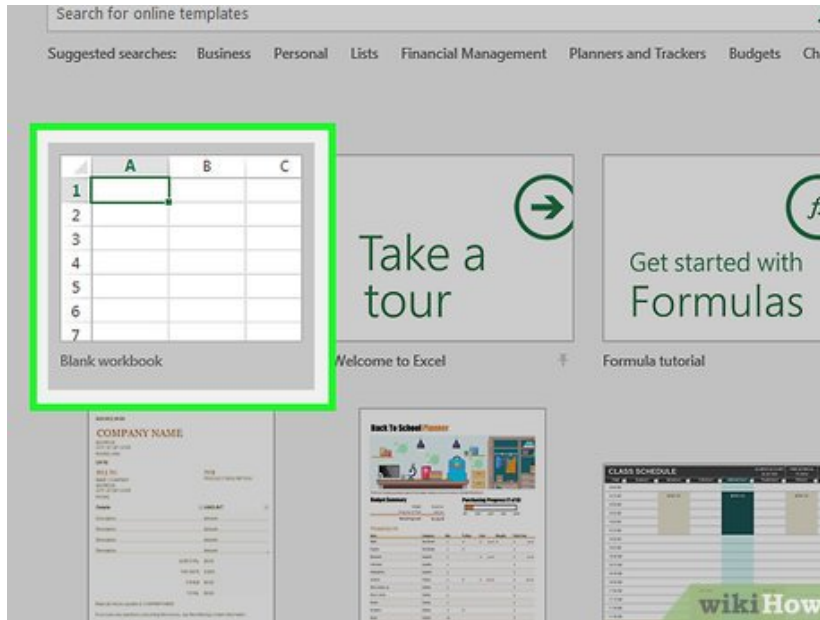
Method 3 of 3:

### Creating an Invoice Manually



**Open Microsoft Excel.** It's a green box with a white "X" on it. The Microsoft Excel home page will open.

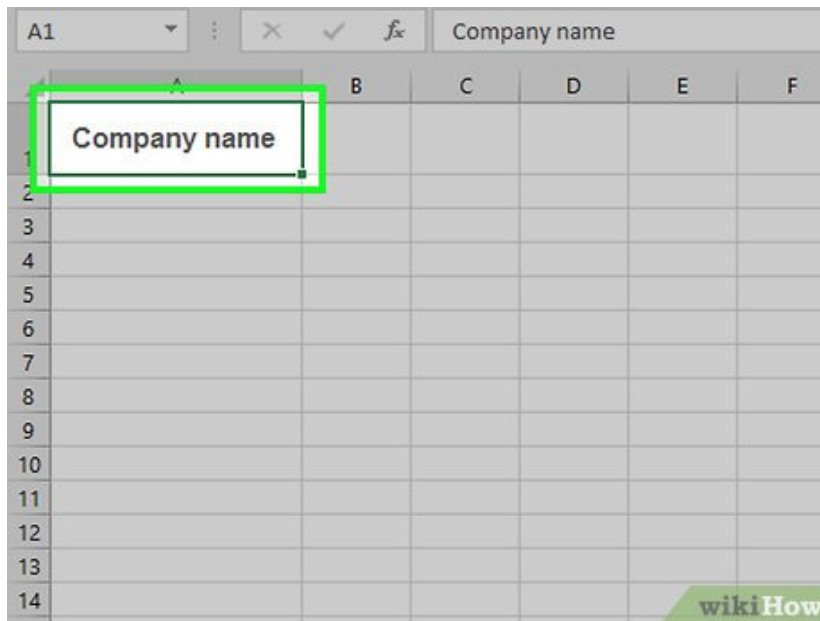
2.



Click **Blank Workbook**. This option is in the upper-left side of the Excel home page. A blank spreadsheet will open.

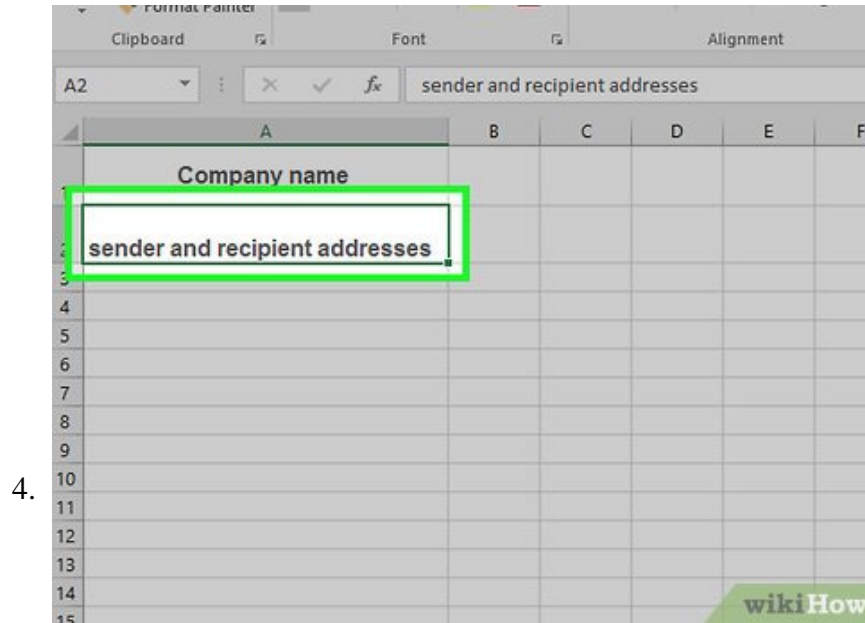
1. On Mac, skip this step if Excel opens to a blank document.

3.



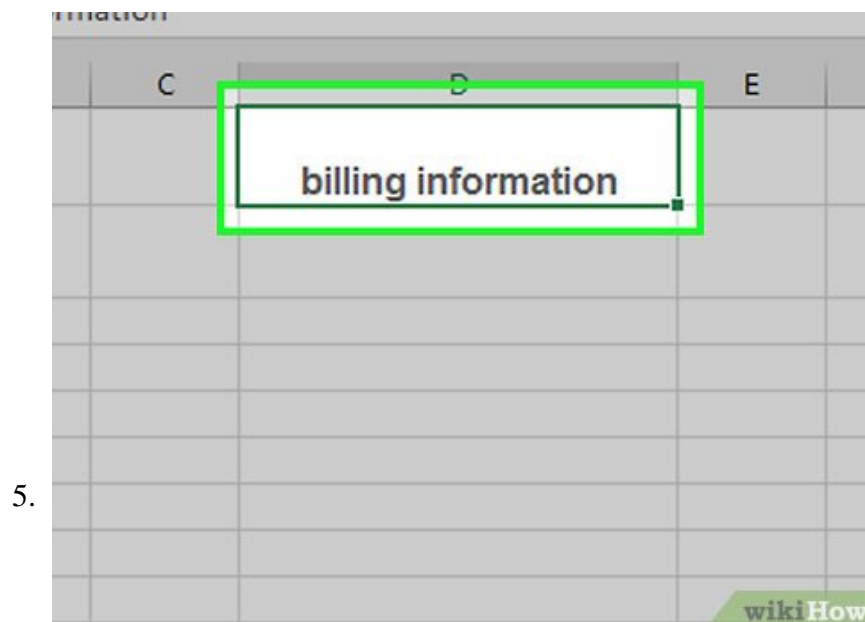
**Create the invoice heading.** Your heading should include the following information:

1. **Company name** - The name of the company to whom the invoice funds will be allocated.
2. **Descriptor** - The word "Invoice" or a description of the type of invoice it is, such as "Price Quote" if you're quoting a price for your services to a client instead of billing for them.
3. **Date** - The date on which you're writing the invoice.
4. **Number** - The invoice number. You can either use a global numbering system for all your clients or individual numbering for each client. If you choose to number for each client, you can include the client name or a form of it in the invoice number, such as "Westwood1."

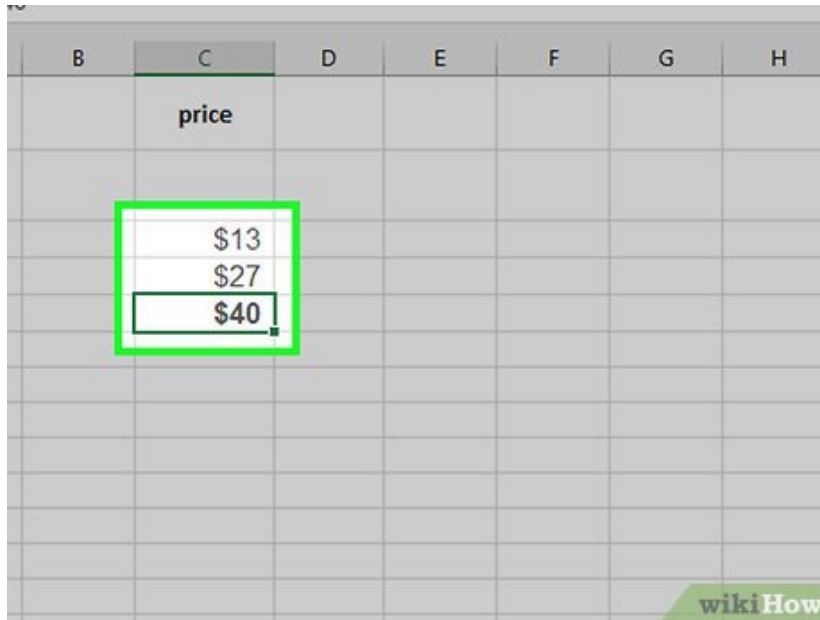


**Enter the sender and recipient addresses.** This information should appear near the top of the invoice, with your information above the client's.

1. Your contact information should include your name, your company's address, a phone number, and an email address.
2. Your client's information should include the company name, the name of the accounts payable person, and the client address. You can also include the client's phone and email address.



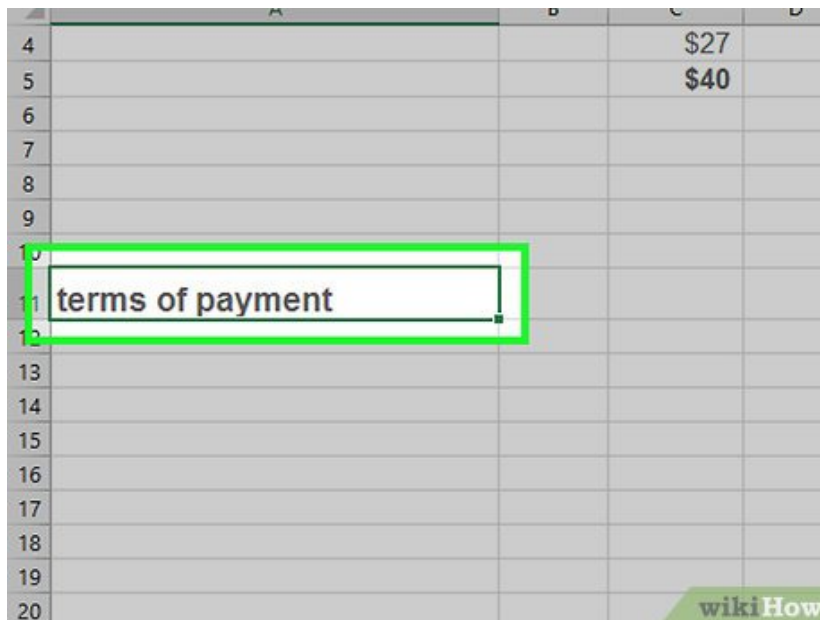
**Enter your billing information.** You can devote a column to a short description of the product or service, a column to quantity, a column to unit price or rate, and a calculated column for the total price for the quantity purchased of that item.



6.

**Display the amount of the total bill.** This should appear below the calculated column of individual charges and can be generated with Excel's SUM function.

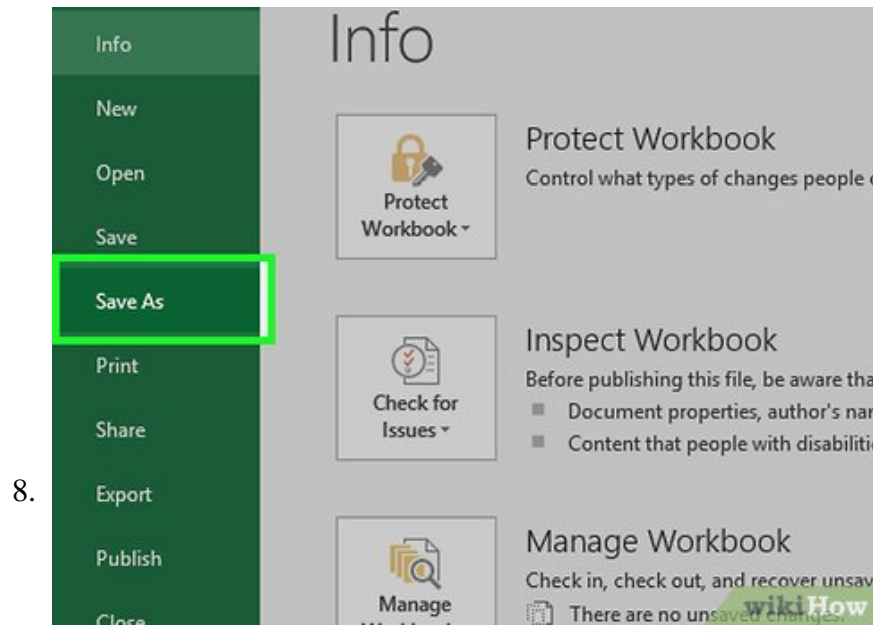
1. For example: if you have \$13 of work in cell **B3** and \$27 of work in **B4**, you might put the formula **=SUM(B3,B4)** in cell **B5** to display \$40 in that cell.
2. If you used an hourly rate (e.g., \$30) in cell **B3** and a number of hours (e.g., 3) in **B4**, you would instead write **=SUM(B3\*B4)** in cell **B5**.



7.

**Include the terms of payment.** This can appear either above or below the billing information. Common payment terms are "Due on receipt," "Due within 14 days," "Due within 30 days," or "Due within 60 days."

1. You may also want to include a memo at the bottom of the invoice covering accepted methods of payment, general information, or a thank-you to your customer for shopping with you.



**Save your invoice.** Use a name that will distinguish the invoice from other invoices you've sent to your client if necessary. To save your invoice:

1. **Windows** - Click **File** in the upper-left side of the page, click **Save As**, double-click a save location, enter your invoice's name, and click **Save**.
2. **Mac** - Click the **File** menu item, click **Save As**, enter a name for your invoice, and click **Save**.

## Sample Invoices

Picture 25 of How to Make an Invoice on Excel

Sample Services Rendered Invoice

Picture 26 of How to Make an Invoice on Excel

Sample Lawn Care Invoice

Picture 27 of How to Make an Invoice on Excel

Sample Printing Invoice

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