Creating Sales Invoices

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

Entering the Labels of the Invoice

1 Start a NEW workbook and set the following initial formats:

- Widen COLUMN C to 26 characters.
- Widen COLUMNS D and E to 14 characters.
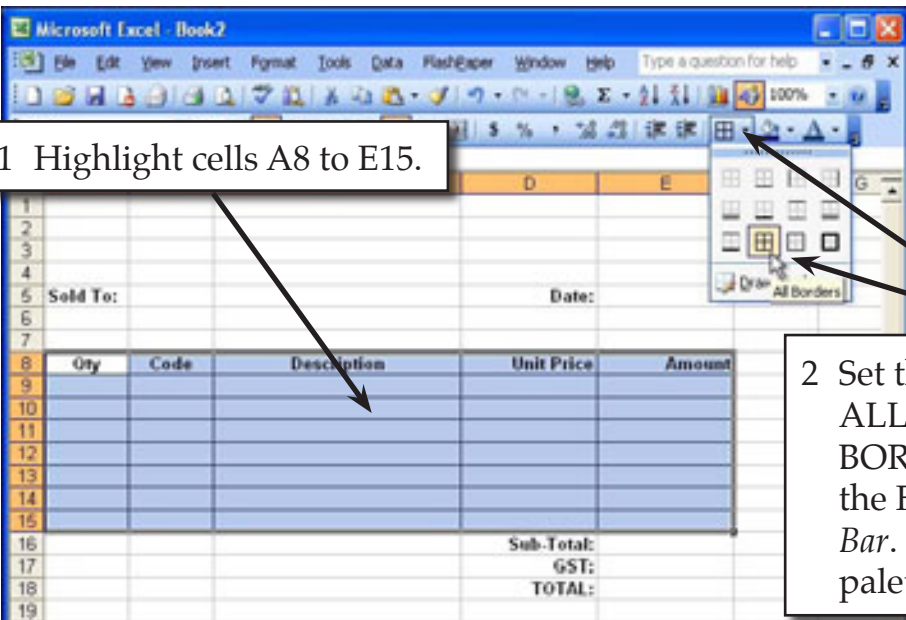
2 Enter the labels shown in the indicated cells.

2 Change each heading to BOLD. Remember, you can hold down the CTRL or keys to select all the cells.

3 Carry out the following formats:

- CENTRE cells A8 to C8.
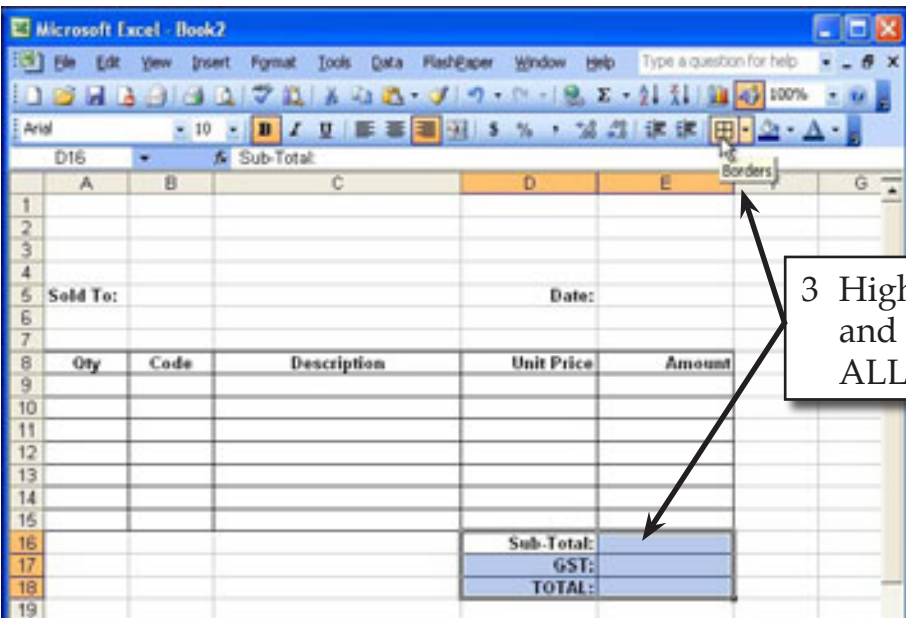- RIGHT ALIGN cells D5 to E18.

Adding Borders

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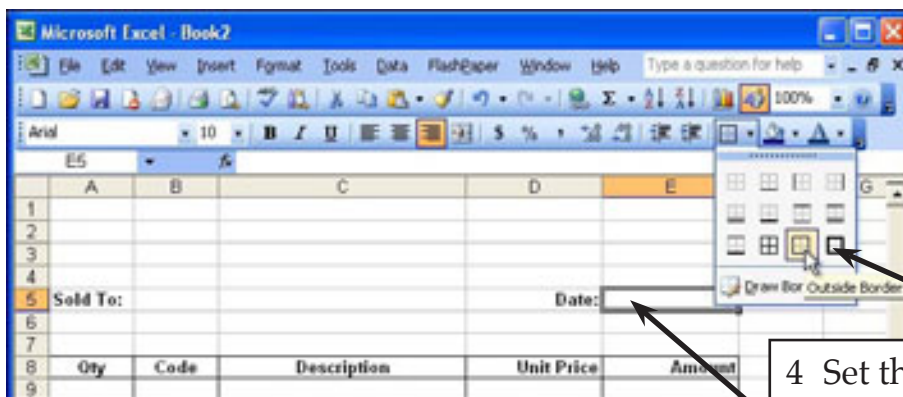

1 Highlight cells A8 to E15.

2 Set their BORDERS to ALL BORDERS using the BORDERS button from the FORMATTING *Tool Bar*. Tear off the BORDERS palette if you wish.
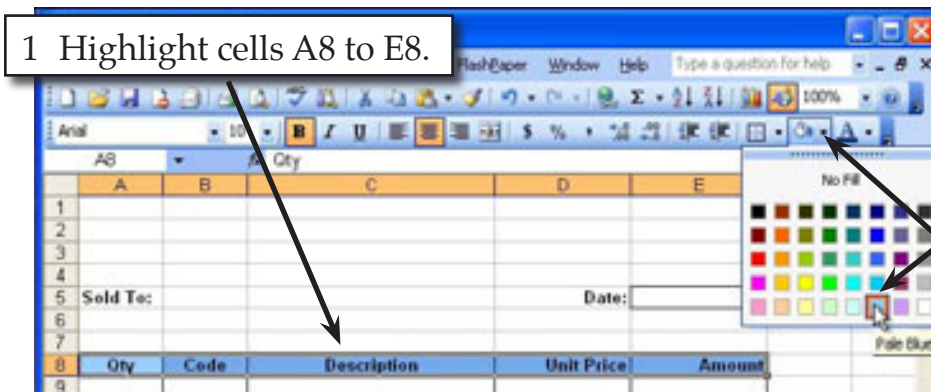

3 Highlight cells D16 to E18 and set their BORDERS to ALL BORDERS.

4 Set the BORDER of cell E5 to OUTLINE by clicking on the OUTSIDE BORDERS button.

Shading the Table Headings

1 Highlight cells A8 to E8.

2 Display the FILL COLOUR palette from the FORMATTING *Tool Bar* and set the colour to PALE BLUE.

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 can also include a graphic or create a company logo.

1   Ensure that the DRAWING *Tool Bar* is displayed at the bottom (or left) of the screen (click on the DRAWING button in the main *Tool Bar* if it isn't).
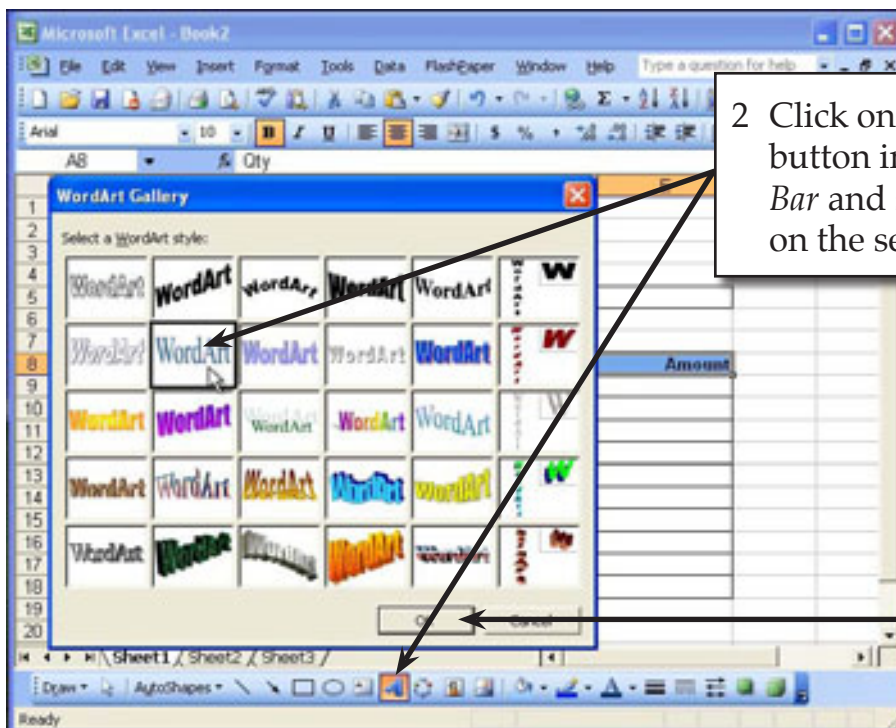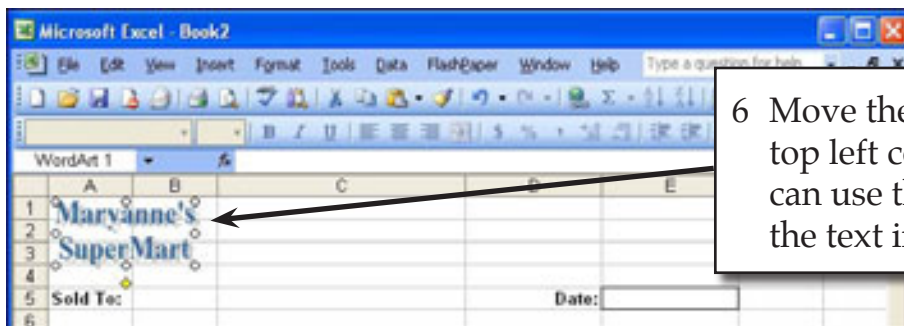
2 Click on the INSERT WORDART button in the DRAWING *Tool Bar* and select the second style on the second row of styles.

3 Select OK.
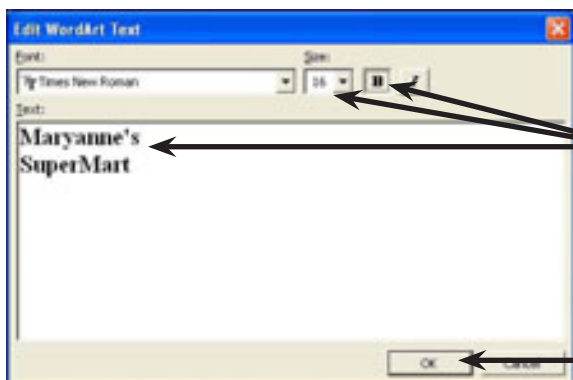
4 Enter the text:

Maryanne's   <enter>
SuperMart

and set the SIZE of the TEXT to 16 POINT and click on the BOLD button.

5 Select OK.

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

7   Click outside the WordArt text to remove its selection.
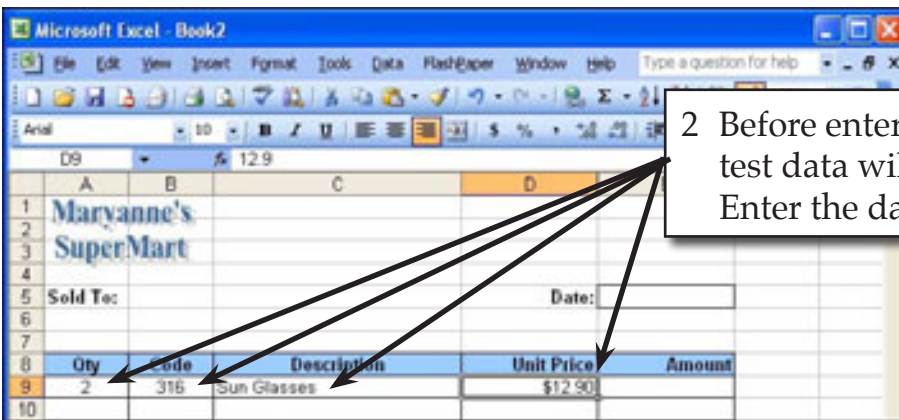
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Entering the Calculations

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:

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