Intro-Spreadsheets Example 2: Invoices

A common use of Excel is to set up and calculate invoices. A sportswear shop supplies kits to football clubs.

We are going to set up the spreadsheet to calculate and display the cost of kit and work out the total cost including VAT at 17.5 per cent. We will develop the spreadsheet to give it a more professional look.

1 In cell AI type Casey's Sportswear. Drag across cells A1 and B1 and click on the Merge and Center icon.
2 In cell A3 enter Address 1. Highlight cells A3 to A5 and select Edit, Fill, Series, select AutoFill and click **OK.**
3 Enter the text Post Code and Tel. No. in cells A6 and A7.
4 In D5 enter the text Customer Address. Merge and Center across D5 and E5.
5 Highlight cells A3 to A7 and click on Copy. Move the cursor to D7 and click on Paste. Complete this step by pressing ESCAPE.
6 Continue to enter the column headings and data as shown below. You may need to widen the column widths by dragging out the column dividers.

	A	B	C	D	E	F	G
1	Caseys Sportswear						
2				Invoice No	1		
3	Address 1			Date	12/11/2010		
4	Address 2						
5	Address 3			Customer Address			
6	Post Code						
7	Tel. No.			Address 1			
8				Address 2			
9				Address 3			
10				Post Code			
11				Tel. No.			
12							
13	Quantity	Catalogue	Item	Unit Price	Cost		
14	13	1	Football Shirts	13.5			
15	1	11	Goalkeeper Shirts	15.5			
16	14	21	Shorts	8.5			
17	14	31	Pair Socks	6.99			
18							
19				Sub Total			
20							
21				VAT			
22							
23				Total			
24							

We now need to add the number formats to some of the cells.

7 Place the cursor in E2. The Invoice No will always be a whole number. Select Format, Cells and set the Number format to 0 decimal places.
8 In E3 set the Date format to **14/03/10.** (The date may be slightly different in previous versions of Excel.)
9 Select cells D 14 to D 17 and set the format to Accounting and 2 decimal places.
10 Save your file as Invoice.

Entering the formulas

1 Enter the formula **=A14*D14** into cell E14. It calculates £175.50.

2 Copy the formula in E14 into cells E15 to E17. There are various ways of doing this:
- Highlight the cells E14 to E17 and click on Edit, Fill Down.
- Click on E14. Click on **Edit, Copy** or the Copy icon. Highlight the cells E15 to E17 and click on **Edit, Paste** or the **Paste** icon.
- Click on E14 and drag the formula down to E17 using the Drag Copy short cut method shown on page 250. Note that as the formula is copied it changes. In row 14 it is =A14'-D14, in row 15 =A15*D15 and so on.

3 Click on E19 and click on the **AutoSum** icon and then press **Enter.**
This will add up the costs of the items.

4 In cell E21 enter the formula **=E19*17.5%.** This will calculate the VAT.

5 In cell E23 enter the formula **=SUM (E19:E21)** to calculate the Total.

6 Format cells E14 to E23 to **Accounting** and 2 decimal places. Symbol = £ sign.

7 Save your spreadsheet again as Invoice.

Your spreadsheet should now look like this.

	A	B	C	D	E	F
1	Caseys Sportswear					
2				Invoice No	1	
3	Address 1			Date	11/12/10	
4	Address 2					
5	Address 3			Customer Address		
6	Post Code					
7	Tel. No.			Address 1		
8				Address 2		
9				Address 3		
10				Post Code		
11				Tel. No.		
12						
13	Quantity	Catalogue	Item	Unit Price	Cost	
14	13	1	Football Shirts	£ 13.50	£ 175.50	
15	1	11	Goalkeeper Shirts	£ 15.50	£ 15.50	
16	14	21	Shorts	£ 8.50	£ 119.00	
17	14	31	Pair Socks	£ 6.99	£ 97.86	
18						
19				Sub Total	£ 407.86	
20						
21				VAT	£ 71.38	
22						
23				Total	£ 479.24	
24						

Presenting Your Spreadsheet

We will now use the formatting tools to smarten the appearance of the invoice and give it a more professional feel.

With a few simple changes we can quickly turn the spreadsheet in to a well presented worksheet

1 Highlight **Casey's Sportswear,** change the Font size to 16 and click on **Bold.** Select cells A1 to C1 and click the **Merge and Center** icon. Click on **Left Align.**

2 In cell D 1 type **Invoice.** Change the Font size to 16 and click on **Bold.** You will need to select cells D1 and E1, click on the **Merge and Center** icon again and **Align Left.** Set the Colour Fill to **Light Gray** (Gray-25%).

3 Highlight cells A3 to A7 and click on **Bold.** Repeat for cells D3 to Ell and cells D 19 to D23. You may have to widen the column a little by dragging out the column divider.

4 Highlight cells A13 to E13 and click on **Bold.** With cells highlighted set the fill colour to **Light Gray** from the Colour Fill drop-down.

5 Select cells A1 to E12. Select **Format, Cells** and click on the **Border Tab.** Select **Color White** and click on the Presets **Outline** and **Inside.** This turns off the gridlines in the top of the spreadsheet.

6 Select cells A13 to E17 and D18 to E23 and click on **Format, Cells.** Click on the **Border** tab, select colour **Black,** a thicker line and click on **Outline** and **Inside.**

7 Change the Fill Colour of cells E14 to E23 to **Light Yellow.**

8 Shade an area at the foot of your spreadsheet to grey and title it **For Office Use Only.**

9 Turn off the gridlines by clicking on **Tools, Options** and unchecking the **Gridlines** box.

10 Your spreadsheet should appear as below Save your work as InvoicePro.

11 Print your spreadsheet in Portrait mode, without the spreadsheet gridlines and ensuring that the document is centred on the page.

	A	B	C	D	E	F
1	**Caseys Sportswear**			**Invoice**		
2				Invoice No	1	
3	**Address 1**			**Date**	**11/12/10**	
4	**Address 2**					
5	**Address 3**			**Customer Address**		
6	**Post Code**					
7	**Tel. No.**			**Address 1**		
8				**Address 2**		
9				**Address 3**		
10				**Post Code**		
11				**Tel. No.**		
12						
13	**Quantity**	**Catalogue No**	**Item**	**Unit Price**	**Cost**	
14	13	1	Football Shirts	£ 13.50	£ 175.50	
15	1	11	Goalkeeper Shirts	£ 15.50	£ 15.50	
16	14	21	Shorts	£ 8.50	£ 119.00	
17	14	31	Pair Socks	£ 6.99	£ 97.86	
18						
19				**Sub Total**	£ 407.86	
20						
21				**VAT**	£ 71.38	
22						
23				**Total**	£ 479.24	
24						
25	For Office Use Only					
26						
27						