

[Company Name]

[Street Address]

[City, ST ZIP]

Phone: (000) 000-0000

INVOICE #
2034
CUSTOMER ID
564

BILL TO

[Name]

[Company Name]

[Street Address]

[City, ST ZIP]

[Phone]

[Email Address]

SHIP TO

[Name]

[Company Name]

[Street Address]

[City, ST ZIP]

[Phone]

DESCRIPTION	QTY	UNIT PRICE
Service Fee	1	200.00
Labor: 5 hours at \$75/hr	5	75.00
New client discount		(50.00)
<i>Thank you for your business!</i>		SUBTOTAL
		TAX (4.25%)
		TOTAL

If you have any questions about this invoice, please contact
[Name, Phone, email@address.com]

HELP

Instructions

Customize the template with your company name, address, and other contact information. Then, save a backup of the file to use as a template for future invoices.

For repeat customers, update the Bill To section and Customer ID and save the file to use as a template for future invoices for that customer. You may want to name the file something like "Invoice Template - Customer Name."

Sending an Invoice

One of the best ways to send an invoice, besides printing a paper copy and mailing it, is to email the invoice as a PDF attachment.

To create a PDF using Excel 2010 or later, go to File > Save As and choose PDF from the list of file types.

Save the PDF to a location on your computer where you will store all your invoice documents and name the file with the customer name and/or invoice number.

Ship To

If the customer's shipping or mailing address is the same as the billing address, you could remove the "Ship To" section by deleting the text and removing the borders and background color.

Currency

To change a currency symbol, select the cell and open the Format Cells dialog box by pressing CTRL+1. Then go to the Number tab to change the format to Currency or Accounting and select the currency symbol.

Color Scheme

To change the theme colors, go to Page Layout > Colors.

Terms

The term "Net 30" or "Net 30 Days" can be used to specify that the payment is expected within 30 days after the goods are sent or the service is fully provided.

You could change the label to "DATE DUE" and enter a date the payment is due. Or, use a formula such as =H5+30 where H5 is a reference to the invoice date cell.

Create a Receipt

You can convert the invoice into a receipt by changing the label in header from "Invoice" to "Receipt." Then, you can add a note below the Total at the bottom saying something like "Paid in full. Thank you!"

Additional Help

The link at the top of this worksheet will take you to the web page on vertex42.com that talks about this template.





