Microsoft Excel – Advanced Topics

Templates – With Microsoft Excel, you can create a spreadsheet (or workbook) that can be used as a "form" to be used on periodic tasks. Take, for example, an Invoice. Create the spreadsheet below – don't put any numbers into the sheet other than tax value.

🗙 Microsoft Excel - invoice.xlt			
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A B This is the current date; use the Now() function and format as shown.			
2			
3 Items Price			
5 currency with two decimals.			
9 SUM(P4:P11)			
10 11			
12 SubTotal \$			
Format the Tax value as a percent with one decimal.			
16 TOTAL \$			
17 The Tax formula should be:			
=B12*C14			
20			
The Total formula should be:			
23 =B14+B12			
Ready NUM NUM			

NOTE: Don't forget the header - it should say "INVOICE" and be in a large, bold font.

When you're done creating the sheet, you're ready to save it.

- 1. On the File menu, click Save As. Unlike Save, Save As allows you to "translate" your spreadsheet (or workbook) into different formats (most to be read by other programs such as Lotus 1-2-3).
- 2. The Save As window at the right should appear.
- 3. In the *Save as type* field, near the bottom, select "template." The folder in the *Save in* field should change to the <u>Templates</u> folder (which is a sub-folder of the <u>Microsoft Office</u> folder – usually found in the <u>Program Files</u> folder).
- **4.** Enter a *File name* (such as "invoice"), and click the save button.
- 5. Finally, close your template with **File**⇒**Close**.

New	? 🗙
General Spreadsheet Solutions	Preview

Now, when you need to use the template, you must open a new workbook with the File \Rightarrow Open menu command, and choose the <u>invoice</u> template from the **New** dialog window.

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Save As	? ×
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