Claritas

General Instructions – Invoice/Quotation/Delivery – Self Calculating (MS Excel)

Customise the template in three simple steps!

1. REPLACE THE LOGO

- Click on the logo and delete
- On the top bar of excel, click on the insert tab
- Click "picture" and add your own logo from your files
- Resize as necessary

2. PERSONALISE THE TEXT TO SUIT YOUR BUSINESS

- All words/phrases to be customised to your business, are in [pink]

3. REMOVE PINK FONT

- Either click Select, select all, on the top bar or highlight the whole document with your mouse
- From the top bar, keeping all text selected, change the colour of the text to black (or your chosen font colour)

USING THE TEMPLATE

1. Once you have personalised the Template, use each line in the description box to enter the service/product sold or quoted for
2. Each line in the description box can be made larger to accommodate more text: click on the ruler to the far right of the screen; drag the bottom of the relevant line downwards.
3. Delete unwanted lines in the description box by highlighting the rows to be deleted, right click, delete and click "delete entire row"
4. Enter the Quantity (QTY) sold or quoted for
5. Enter the Item Price
6. The total will self calculate
7. Highlight any unused cells in the Total column by clicking on the first cell and dragging the mouse down. Press delete
8. If you are not VAT registered, click on the VAT cell and change it to zero