

Invoice Generator – Excel VBA Project (AI-Assisted Automation)

Project Overview

This project features a professional, reusable **invoice template in Excel**, built for freelancers and service providers. It uses dynamic formulas for client and service selection and integrates an **AI-assisted VBA macro** to automate PDF export and email delivery — showcasing practical Excel automation with AI support.

Invoice Sheet Setup

Sheet: Invoice

The invoice auto-fills and calculates values using Excel formulas and dropdowns:

- Invoice No. (Auto-generated)
- Date (=TODAY())
- Client Name (Dropdown via data validation)
- Address & Contact (Auto-filled with VLOOKUP)
- Product/Service Selection (Dropdown)
- Unit Price (Auto-filled via VLOOKUP)
- Quantity × Price → Total
- GST & Discount Logic
- Final Amount Calculation

INVOICE

Date: 07-07-2025
Invoice No: INV-007

Bill To

Client Name:
Address:
Contact:

QTY	Product/Service	Unit Price	Total
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00

Subtotal:

0.00

GST(18%):

0.00

Discount:

500.00

Total:

-500.00

Thank You!!!

Print

Data Sources

Sheet: ClientList





- Client Name, Address, Contact

Sheet: PriceList

- Product/Service Name, Unit Price
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VBA Macro – SaveOrMail_A1G35

Developed using **AI-assisted VBA scripting**, this macro enables:

-  One-click export of invoice range (A1:G35) as PDF
 -  Option to **Save** the PDF via dialog
 -  Option to **Email** the invoice directly using **Outlook**
 -  Automatically deletes the temporary PDF after action
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Skills Demonstrated

- Excel Formulas (VLOOKUP, SUM, Conditional Logic)
 - Data Validation & Dynamic Dropdowns
 - **AI-Assisted VBA Automation**
 - PDF Export & Outlook Integration
 - Clean Print-Ready Invoice Design
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Objective

To simulate a real-world freelance billing workflow using Excel and AI-enhanced VBA. This project reflects modern Excel skills by combining **manual logic building** with **AI tools** for faster, smarter automation.