

INVOICE CHECKLIST

Everything your invoice needs before you press **Send**.

A clear, accurate invoice helps you get paid faster.

Use this checklist before sending every invoice to help reduce queries and get paid more quickly.



YOUR BUSINESS

- Business Name
- Business Address
- Contact Name
- Telephone Number
- Email address
- Company number (if applicable)
- VAT number (if applicable)
- UTR and NI number (for CIS contractors)



WHAT YOU'VE SUPPLIED

- Clear description of goods / services
- Quantity (where applicable)
- Unit Price
- VAT shown separately
- VAT rate
- CIS deduction shown separately (if applicable)
- Total amount due



YOUR CUSTOMER

- Customer / Business Name
- Customer Address
- Contact Name
- Purchase order number (if supplied)



DON'T FORGET YOUR BANK DETAILS!

- Account Name
- Sort Code
- Account number
- IBAN / Swift (if international)



INVOICE DETAILS

- Unique Invoice Number
- Invoice Date
- Payment Due Date
- Payment terms



FINAL CHECK

Before clicking **Send**, ask yourself:

Would someone receiving this invoice know exactly what they're paying for, how much to pay and how to pay it?

If the answer is yes, you're ready to send it.



COMMON INVOICE MISTAKES

That delay payment

Even small mistakes can delay payment while your customer asks questions or waits for clarification.

Here are the top 10 to avoid.

1

FORGETTING YOUR BANK DETAILS



Your customer can't pay you if they don't know where to send the money

6

FORGETTING YOUR VAT NUMBER



Your VAT number is required on all VAT invoices.

2

NO INVOICE NUMBER



Makes it difficult for both you and your customer to track payments

7

INCORRECT VAT CALCULATIONS



Always double check your VAT totals and calculations

3

VAGUE DESCRIPTIONS



Avoid 'services' or 'work completed'. Tell your customer exactly what you've supplied.

8

MISSING PURCHASE ORDER NUMBER



Many larger businesses won't process an invoice without one.

4

MISSING PAYMENT TERMS OR DUE DATE



Don't assume everyone knows when payment is due

9

SENDING AN EDITABLE INVOICE



Always send a PDF unless changes are expected

5

INCORRECT CUSTOMER DETAILS



Check you are invoicing the right business address

10

NOT CHECKING BEFORE SENDING



One minute of checking could save days of chasing payment

At Accountancy Solutions, we help small businesses with bookkeeping, VAT, payroll and accounts, leaving you free to focus on running your business.



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