

1 Before you send an invoice

Use this one-page check before each invoice. It helps you make the payment request clear, correctly addressed and easy for your customer to approve. It is a working checklist, not tax or legal advice; check current HMRC requirements if you are VAT-registered.

Check	Confirm before sending
☒	Your legal business name, address and contact email are shown.
☒	The customer's legal name and billing address match the purchase order or agreed brief.
☒	The invoice has a unique number that follows your normal sequence.
☒	The issue date, supply date where applicable, and payment due date are clear.
☒	The goods or services are described in plain language, with the agreed quantity or period.
☒	The unit price, subtotal, discounts, VAT rate and total due have been checked.
☒	Your VAT registration number and the required VAT wording are included where applicable.
☒	Bank details are correct and have been copied from your verified business records.
☒	The payment reference tells the customer exactly what to use.
☒	The payment terms state the due date and any agreed late-payment position.
☒	The invoice is sent to the named accounts-payable contact, with any purchase-order number.
☒	A copy is saved in your accounting system, alongside the quote, order or approval.

2 A simple payment instruction

> Please pay £ by using reference . If there is a query, contact before the due date so we can resolve it quickly.

3 After sending

Record the date sent, set one reminder before the due date, and check that the money arrives. If it is late, start with a calm prompt that includes the invoice number, amount, due date and bank details. Keep every chase in one place.

Founder Finances · Downloaded resource · Review current tax and invoicing requirements before relying on this template.