Invoice before sending checklist

Run this list before you send an invoice. It catches the mistakes that bounce an invoice back or stall payment: the wrong billing entity, a missing PO number, the wrong amount, or unclear payment details. Work top to bottom, then send.

Business and client details

- [ ] Your business name, address, and tax ID are correct
- [ ] The Bill To entity is the client's correct legal name, not just their trading name
  Why: AP systems route and match on the legal entity; a mismatch can reject the invoice
- [ ] The billing address is the client's billing address, not their office or shipping address
- [ ] A PO number is included if the client requires one
  Why: many AP systems auto-reject an invoice with no matching PO
- [ ] The recipient / AP contact is the person or inbox that actually pays

Amounts

- [ ] Every line item has the right description, quantity, and rate
- [ ] Subtotal, tax, and total all add up
- [ ] The tax rate and label are right for the client's jurisdiction (or correctly zero-rated / reverse-charge)
- [ ] The currency is set and shown explicitly
  Why: "$" alone is ambiguous across USD, CAD, AUD and delays cross-border payment
- [ ] Any discount is applied and visible on the invoice

Terms and delivery

- [ ] The invoice number is unique and follows your sequence
- [ ] Issue date, due date, and payment terms (e.g. Net 30) are all stated
- [ ] Payment details are complete and correct (bank / ACH / wire, or a pay link)
- [ ] Late-fee or terms wording is included if you intend to enforce it
  Why: a late fee is only enforceable if it was stated on the invoice
- [ ] You're sending to the right address, with AP or accounts cc'd where needed

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