

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