

Small Business Invoice Checklist

A practical checklist for preparing clear, accurate, professional invoices and reducing common billing mistakes.

Goal: Make every invoice easy to understand, easy to verify, and ready to send. Review business details, customer information, line items, totals, payment terms, and the final file before delivery.

1. Business Details

- Confirm the business name and logo are correct.
- Check the business address, phone number, and email address.
- Add relevant registration or tax details when required.
- Use consistent branding across invoices and related documents.

2. Customer Details

- Confirm the customer or company name.
- Check the billing address and contact details.
- Use the correct customer reference or purchase order number when applicable.
- Verify the invoice is being sent to the intended customer.

3. Invoice Information

- Use a unique invoice number.
- Add the invoice date.
- Include the payment due date or agreed payment terms.
- Reference the related order, project, service period, or quotation when useful.

4. Items, Services and Prices

- List each product or service clearly.
- Use understandable descriptions and quantities.
- Check unit prices, discounts, and line totals.
- Confirm taxes or other charges are applied correctly.

5. Totals and Payment

- Verify subtotal calculations.
- Check tax amounts and the final total.
- State the currency clearly.
- Provide accurate payment instructions and accepted payment methods.
- Include late-payment or other terms when relevant to your agreement.

6. Final Quality Check

- Make sure there are no spelling or formatting errors.
- Check that tables, totals, and contact information fit within the page.
- Confirm the invoice is readable on mobile and desktop.
- Use a clear, descriptive file name before sending the final PDF.

7. Before You Send

- Confirm the invoice matches the agreed price or quotation.
- Check that the correct customer and billing period are shown.
- Open the final PDF to make sure it displays correctly.

- Keep a copy of the final invoice in your business records.

Invoice Pre-Send Review

Check	Done
Business details verified	■
Customer details verified	■
Invoice number and dates checked	■
Items and prices verified	■
Taxes and totals checked	■
Payment instructions checked	■
Final PDF reviewed	■

Listovix tip: An accurate invoice helps prevent delays and misunderstandings. Before sending, compare the final document with the agreed price, customer details, and payment terms.