

Small Business Receipt Checklist

A practical checklist for creating clear, accurate receipts and keeping customer transaction records organized.

Goal: Make every receipt easy to understand and easy to match to a completed transaction. Review business details, customer information, payment details, amounts, and the final document before issuing it.

1. Business Details

- Confirm the business name and branding.
- Check the business address, phone number, and email address.
- Include relevant registration or tax information when required.
- Use consistent business details across receipts and invoices.

2. Transaction Details

- Assign a unique receipt number or reference.
- Record the transaction date.
- Identify the relevant order, sale, booking, or service.
- Keep the receipt linked to the correct transaction record.

3. Customer Information

- Add the customer name when appropriate or required.
- Include contact details when useful for the transaction record.
- Check that the receipt is associated with the correct customer.

4. Products, Services and Amounts

- List the products or services clearly.
- Show quantities where useful.
- Verify unit prices and line totals.
- Check discounts, taxes, fees, and the final amount paid.

5. Payment Information

- State the total amount received.
- Identify the payment method when appropriate.
- Show the currency clearly.
- Record any balance, change, refund, or payment reference when relevant.

6. Final Quality Check

- Check spelling, dates, numbers, and customer details.
- Make sure the receipt is readable on screen and in print.
- Use a clear file name when saving a digital receipt.
- Confirm the final receipt matches the completed transaction.

7. Record Keeping

- Store receipts in an organized location.
- Keep records according to your business and applicable record-keeping requirements.
- Protect customer and transaction information from unnecessary access.
- Back up important digital records.

Receipt Pre-Issue Review

Check	Done
Business details verified	■
Receipt number and date checked	■
Customer details verified	■
Items and amounts verified	■
Payment method and amount checked	■
Final receipt reviewed	■
Record stored safely	■

Listovix tip: A clear receipt gives the customer a useful transaction record and helps the business keep its records consistent. Check the final amount and transaction details before issuing it.