Client onboarding checklist for billing

Settle these with a new client before the first invoice, so it can be paid first time.

Who pays, and where the invoice goes

- [ ] **Legal name and billing address** of the company that pays, confirmed in writing (not only its brand name).
- [ ] **Billing contact:** who to address it to, such as “Attn: Accounts Payable” or a named person in finance.
- [ ] **Accounts payable email address** for invoices, or the link to register on their supplier portal.
- [ ] **Your contact's name or reference** for the invoice, and their agreement to be copied on the email.

Purchase orders and references

- [ ] **Purchase orders:** do they use them? If so, the PO number before you start, and whether the invoice total must match it exactly.
- [ ] **Other references:** a cost centre, project code or the supplier number they gave you, if they need one.

Supplier setup

- [ ] **Their supplier form** (sometimes called a vendor form) returned before, or with, your first invoice.
- [ ] **Any tax form the payer asks for,** such as a W-9 or W-8BEN for a US payer, taken from the tax authority's own website and sent the way they ask.
- [ ] **Bank details** sent once, the way they ask. Expect a call to confirm if you ever change them.

Payment

- [ ] **Payment method agreed:** bank transfer, a payment link or both, and the reference they should quote.
- [ ] **Payment terms agreed** before you start, including any printed on their PO or supplier agreement.
- [ ] **Payment run days** and the cut-off for invoices to make each run.
- [ ] **Their format,** if they have one: a portal, their own template or electronic invoices.

Details to note

Client legal name _____ Accounts payable email _____

Attn / contact _____ PO number _____

Supplier number _____ Payment terms _____

Payment runs _____ Invoice cut-off _____

More on billing a company:
charminginvoices.com/blog/invoicing-a-company

General information, not legal or tax advice. If you are unsure which tax form applies to you, ask an accountant.

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