First-invoice checklist

The seven things every invoice needs, and five checks before you send it.

The seven things

- [ ] **Your name and how to reach you.** Your business name, or your own name if you do not have one, and at least an email address.
- [ ] **Who it is for.** The client's name, and the company name if you are billing a company. If a finance department pays, ask who to address it to.
- [ ] **What the work was.** One line per thing, in words your client would recognise: “Logo design — three concepts, two revision rounds”, not “Design services”.
- [ ] **The amounts.** A rate and a quantity, or a flat total, on each line, then the total for the whole invoice. If you charge sales tax, VAT or GST, show it as its own line.
- [ ] **An invoice number.** Unique and in sequence: start at 001 and count up, or use 2026-001.
- [ ] **Two dates: issue and due.** The day you send it, and when you expect the money, with the terms in words: “Due 14 October 2026 (Net 14)”.
- [ ] **How to pay you.** Bank transfer details or a payment link, and any reference the client should include.

Before you send it

- [ ] The amount is the one you agreed before you started the work.
- [ ] No tax number you do not hold, and no tax line if you do not charge tax.
- [ ] Saved as a PDF and opened once: nothing cut off, the total where you expect it.
- [ ] A short, warm covering email with the invoice attached, and no apology.
- [ ] The due date in your calendar and a copy of the invoice kept with your records.

After you send it

- [ ] Nothing by the due date? A few days after it, send one short, polite follow-up naming the invoice number.
- [ ] Do not read anything into a quiet client: it usually means your email is sitting under forty others.

The full guide, with a worked example:
charminginvoices.com/blog/first-invoice-what-to-do

General information, not legal or tax advice. What an invoice has to show varies by country: check your tax authority's guidance or ask an accountant.

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