



Freelancer Invoice Checklist

What to check before, on and after every invoice

A free PDF checklist with 22 tasks to help freelancers and small businesses send complete invoices and follow up on payment. No sign up or email required.

■ BEFORE YOU SEND

- ☐ Verify client name and contact details
- ☐ Confirm project scope and deliverables
- ☐ Check payment terms and due date
- ☐ Review hours or units billed
- ☐ Ensure rate or price is correct
- ☐ Add any agreed discounts or adjustments

■ ON EVERY INVOICE

- ☐ Include invoice number and date
- ☐ List each service or product with description
- ☐ Show quantity and unit price
- ☐ Calculate subtotal and total
- ☐ Add your business name and address
- ☐ Include payment instructions and methods
- ☐ Attach supporting documents if needed

■ AFTER YOU SEND

- ☐ Send invoice via agreed method
- ☐ Record sent date and method
- ☐ Save a copy to your records
- ☐ Notify client of invoice sent
- ☐ Set a reminder for follow-up

■ ONCE A MONTH

- ☐ Review all open invoices
- ☐ Check for overdue payments
- ☐ Send payment reminders
- ☐ Update invoice status in your records