

Financial training For non financial staff



The financial training specialists

10 boxes to tick before you send the invoice

Often it's hard to get paid because we've given the customer an excuse not to pay when we invoice. Before you invoice, can you answer "Yes" to the following questions:

- 1 Are you invoicing the right person...
- 2 ...at the right address?
- 3 Have you include a Purchase Order number (if it's required)?
- 4 Have the goods been delivered?
- 5 Have any customer queries or issues been resolved?
- 6 Has all the required paperwork been supplied (guarantees, warranties, other documentation)?
- 7 Is the invoice correct?
- 8 Is the invoice free from any unexpected extras?
- 9 Have all the requirements of the customer order been fulfilled?
- 10 Does the price on the invoice agree to the original quote (and any further amendments)?