SALES AND FINANCE

Invoice preflight checklist

A final review checklist before sending an invoice, so the client, work, timing, payment terms, and contacts all line up.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

An invoice is ready to send and needs a careful last check.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Match invoice to approved work**
- [ ] 02 **Verify client details**
- [ ] 03 **Check dates and terms**
- [ ] 04 **Attach supporting detail if needed**
- [ ] 05 **Choose the right recipient**
- [ ] 06 **Schedule follow-up**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.