How to Invoice a Client and Follow Up on Late Payment Profess

Finance and Business · about 18 minutes · 2026-11-12

A practical 32-step guide to getting paid without drama: agree the terms before work starts, put a complete invoice together, send it with a record, follow up on a late payment in a clear sequence, and make the next invoice easier.

Agree the Terms Before Any Work Starts

1. **Write a one-page description of the work**
   Write a one-page description of the work.
2. **State the price and what triggers payment**
   State the price and what triggers payment.
3. **Confirm who approves and where the invoice goes**
   Confirm who approves and where the invoice goes.
4. **Set a payment period you can both confirm**
   Set a payment period you can both confirm.
5. **Ask whether a purchase order or portal is required**
   Ask whether a purchase order or portal is required.
6. **Keep every change to the scope in the same thread**
   Keep every change to the scope in the same thread.

Put the Invoice Together

7. **Check which fields your jurisdiction requires**
   Check which fields your jurisdiction requires.
8. **Give the invoice one unique number and a date**
   Give the invoice one unique number and a date.
9. **Add both parties' details exactly as agreed**
   Add both parties' details exactly as agreed.
10. **List deliverables as separate readable lines**
    List deliverables as separate readable lines.
11. **Reference the agreement, milestone or order number**
    Reference the agreement, milestone or order number.
12. **Add up the lines and check the total twice**
    Add up the lines and check the total twice.

Send It and Keep a Record

13. **Send the invoice to the confirmed billing destination**
    Send the invoice to the confirmed billing destination.
14. **Attach a clean, non-editable copy**
    Attach a clean, non-editable copy.

15. **Write one short, factual covering note**

    Write one short, factual covering note.

16. **Add a row to your payment log the same day**

    Add a row to your payment log the same day.

17. **Save the sent copy with the agreement**

    Save the sent copy with the agreement.

18. **Note the due date somewhere you will see it**

    Note the due date somewhere you will see it.

19. **Confirm receipt if the client's process expects it**

    Confirm receipt if the client's process expects it.

Follow Up on a Late Payment

20. **Verify the due date and the bank record first**

    Verify the due date and the bank record first.

21. **Look for a returned or unanswered message**

    Look for a returned or unanswered message.

22. **Send one short factual reminder**

    Send one short factual reminder.

23. **Keep every follow-up in one dated thread**

    Keep every follow-up in one dated thread.

24. **Ask a specific question rather than repeating the amount**

    Ask a specific question rather than repeating the amount.

25. **Move the conversation to the billing contact or manager**

    Move the conversation to the billing contact or manager.

26. **Check official guidance before adding any charge or formal step**

    Check official guidance before adding any charge or formal step.

Make the Next One Easier

27. **Reconcile the payment against the invoice row**

    Reconcile the payment against the invoice row.

28. **File the paid copy with the agreement and the sent copy**

    File the paid copy with the agreement and the sent copy.

29. **Write down what delayed this payment**

    Write down what delayed this payment.

30. **Reuse one checked template and one numbering scheme**

    Reuse one checked template and one numbering scheme.

31. **Ask for the billing details at the start of every new engagement**

    Ask for the billing details at the start of every new engagement.

32. **Review the log once a month, before anything is overdue**

    Review the log once a month, before anything is overdue.

Sources

1. GOV.UK — official UK government services
   https://www.gov.uk/
2. Citizens Advice — consumer and work guidance
   https://www.citizensadvice.org.uk/
3. Acas — workplace rights and employment guidance
   https://www.acas.org.uk/
4. MyMoney.gov — Five foundations of personal finance
   https://www.mymoney.gov/
5. USA.gov — official U.S. government services
   https://www.usa.gov/
6. investor.gov — SEC investor education
   https://www.investor.gov/
7. NIST — Small business cybersecurity
   https://www.nist.gov/itl/smallbusinesscyber
8. Purdue OWL — writing and citation guide
   https://owl.purdue.edu/
9. LinkedIn — career and job-search resources
   https://www.linkedin.com/

Written as a checklist from https://www.howcompass.com/how-to/How-to-Invoice-a-Client-and-Follow-Up-on-Late-Payment. Corrections: https://