

# INVOICING CHECKLIST

## Build A Payment Structure To Fit Your Customer's Needs

Use this list as a guide to collect information from your customer and set up their invoice perfectly from day one of your contract:

### WHAT DOES YOUR CUSTOMER'S BILLING CYCLE LOOK LIKE?

- Monthly
- Quarterly
- Annually

### WHAT DOES YOUR CUSTOMER'S METER CYCLE LOOK LIKE?

- Monthly
- Quarterly
- Annually

### WHAT IS AN APPROPRIATE DUE DATE?

Do they require board meetings or additional approval processes in order to pay the invoice?

Due Date: \_\_\_\_\_

Notes: \_\_\_\_\_

### IS A P.O. REQUIRED?

Is this required on each Invoice?

- Yes
- No

How often is new P.O. generated? \_\_\_\_\_

### WHERE SHOULD THE INVOICES BE SENT?

Company: \_\_\_\_\_

Attention: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### WOULD YOUR CUSTOMER LIKE A COPY OF THEIR INVOICE EMAILED TO THEM?

- Yes - Email + Mail
- Yes - Email Only
- No

If yes, please list 2 email addresses:

\_\_\_\_\_

\_\_\_\_\_

### IS YOUR CUSTOMER EXEMPT FROM SALES TAX?

- No
- Yes

\*If yes, please collect current exempt form and send to your representative

### PLEASE LIST ANY OTHER SPECIAL INSTRUCTIONS BELOW:

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