

INVOICE

Invoice template for Word

Invoice number

Invoice date

Payment due

FROM

Your business name

Address

Town and postcode

Phone

Email

BILL TO

Client name

Company (if any)

Address

Town and postcode

Purchase order number — if they issued one

DESCRIPTION	QTY	UNIT PRICE (£)	AMOUNT (£)

Subtotal£

Total due£

HOW TO PAY

Bank name

Account name

Sort code

Account number

Payment reference — use the invoice number

Payment terms — e.g. 14 days from invoice date

Before you send it: what a word invoice must show

- ☐ **The word "Invoice"**
Literally the word, near the top. A document that does not say what it is gets treated as a quote.
- ☐ **A unique invoice number**
Sequential, never reused. In Word this is manual, so keep the running number in the filename as well as on the page.
- ☐ **Your name and address**
Trading name, and your real address. A PO box alone is not enough if you are chasing payment later.
- ☐ **The client's name and address**
The legal entity being billed, not the individual who briefed you, or you will struggle to enforce it.
- ☐ **Invoice date and supply date**
The date you issued it and the date the work happened. They are often different and both matter.
- ☐ **Description, amount and total**
One line per item. Word will not add these up, so check the total by hand every time.
- ☐ **Payment terms and bank details**
A due date rather than "on receipt", plus sort code and account number.

Where this one goes wrong

- ☐ **Overwriting the last invoice**
Editing yesterday's file and saving over it destroys your only copy of what you sent. Save as a new file per invoice, or use a .dotx template.
- ☐ **Sending the .docx itself**
The client can edit it, and fonts shift on their machine. Export to PDF before sending, every time.
- ☐ **Manual totals that drift**
Word does not calculate. A single mistyped line item becomes a dispute weeks later when the payment does not match.