

HVAC INVOICING CHECKLIST

DATE: The invoice should be on the day you send it to your customer, not the day that you create the invoice.

INVOICE NUMBER: This should help you find the invoice as well as understand key information about the invoice.

CUSTOMER DETAILS: You should triple check that you have all the required details here including name/contact person, address, phone number, etc.

PART DESCRIPTIONS: You should describe all parts used including SKU, manufacturer, name etc.

COSTS AND DISCOUNTS: Your invoice should show cost per part as well as total and any additional taxes or fees. If you offered any discounts, those should be clearly stated on a separate line item.

PAYMENT TERMS: Your HVAC invoice should include the terms of payment that were agreed upon with the customer.

PAYMENT DUE DATE: It is a best practice to include a date when the invoice is due and you may want to include any information on additional fees that could be assessed if received after that date.

YOUR CONTACT, VAT AND PAYMENT INFORMATION: Hopefully you are using a standard invoice template that already includes this information. But if not, be sure your invoice clearly shows your address, phone, website, and VAT (if applicable) as well as any information on where/how customers can submit payment.

ADDITIONAL TIPS:

DOES THE CUSTOMER KNOW THIS IS COMING? If this is the first time you are sending an invoice, you may want to give the customer a call and let them know you are sending.

DOES IT NEED TO GO TO ANY SPECIAL ATTENTION? If so, make sure it has that person's name on the invoice.

WERE THERE ANY SPECIAL APPROVALS REQUIRED? If so, be sure you have that prior to sending.

SAVE A COPY. Whatever system you are using to create the invoice, be sure you have a copy.

SET A REMINDER TO FOLLOW UP. If you are not using an automated invoicing system, be sure to set a reminder when the invoice is due so that you can assess any fees and follow up with another reminder.