Quote-to-invoice checklist

v1.0 · November 2026 · Print it and tick each box.

Before you send the proposal

- [ ] Client name, company and contact spelled correctly
- [ ] Scope and deliverables match what the client asked for
- [ ] Each option differs in scope, not only in price
- [ ] Prices checked in the calculator; currency shown next to every amount
- [ ] Out-of-scope list and assumptions filled in
- [ ] Payment schedule and "valid until" date filled in
- [ ] Every [placeholder] and "Example:" line replaced or deleted

When the client accepts

- [ ] Accepted option and date recorded (email or signed acceptance saved)
- [ ] Any terms or agreement sent and agreed (your own, or drafted by your lawyer)
- [ ] First payment or deposit requested, if your schedule has one

During the project

- [ ] Any extra request logged on a scope-change form and approved before work starts

Before you invoice

- [ ] Line items copied from the accepted option (Copy-to-invoice tab), plus approved changes
- [ ] Invoice number, date, due date and payment details correct
- [ ] Currency and amounts match the proposal and change forms
- [ ] Tax line only if it applies to you; if unsure, check with a CA or a qualified tax adviser where you live
- [ ] Copy of proposal, change forms and invoice saved together

General information, not legal, tax or accounting advice.