

Chauffeur invoicing that gets you paid, from the deposit to the final balance.

Use a familiar job. Mark what you have checked, note the gaps and agree the next step with your team.

1. Decide when each type of client is invoiced.

- ☐ Write one invoicing rule for each client type.
- ☐ Raise every invoice from the confirmed booking.
- ☐ Bill late extras on a separate invoice.

2. Take deposits and card payments before the job.

- ☐ State the deposit amount and due date in the quote.
- ☐ Send the card link with the invoice, not separately.
- ☐ Record every payment with the method used.

3. Set terms for account clients before the first job.

- ☐ Agree terms and the billing contact in writing.
- ☐ Choose per-job or consolidated billing for each account.
- ☐ Review accounts with a balance before accepting new work.

4. Record part-payments and chase balances by age.

- ☐ Record each part-payment the day it arrives.
- ☐ Chase by age, starting on the due date.
- ☐ Pause new bookings for accounts well past terms.

5. Correct mistakes with credit notes, not edits.

- ☐ Void or credit a sent invoice, never overwrite it.
- ☐ Write the reason down every time.
- ☐ Match every refund to your cancellation terms.

6. Give your accountant a clean month-end.

- ☐ Agree a month-end cut-off with your accountant.
- ☐ Export invoices, payments and credits for the same dates.
- ☐ Keep receipts attached to the costs they support.

Our next step / owner / date

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