



# INVOICE TEMPLATES

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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# Invoice Templates

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## Professional Billing Documents

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## 1. Project Deposit Invoice

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INVOICE																	
<p>   Invoice #: INV-[XXXX]    Date: [DATE]    Due Date: [DUE DATE]</p>																	
<p>   FROM:    [Your Company Name] TO:    [Your Address] [Client Company Name]    [Your Email] [Client Address]    [Your Phone] Attn: [Contact Name]</p>																	
<p>   PROJECT: [Project Name]    AGREEMENT: [Agreement #]</p>																	
<table border="1"><thead><tr><th>DESCRIPTION</th><th>AMOUNT</th></tr></thead><tbody><tr><td>   Project Deposit - [Project Name]    (50% of total project fee of \$[X,XXX])</td><td>\$[X,XXX.XX]</td></tr><tr><td>   Includes:    • [Workflow 1]    • [Workflow 2]    • Documentation &amp; Training    • [X] Days Post-Launch Support</td><td></td></tr><tr><td>  </td><td>SUBTOTAL \$[X,XXX.XX]</td></tr><tr><td>  </td><td>TAX ([X]%) \$[XXX.XX]</td></tr><tr><td>  </td><td><hr/></td></tr><tr><td>  </td><td>TOTAL DUE \$[X,XXX.XX]</td></tr><tr><td>  </td><td></td></tr></tbody></table>		DESCRIPTION	AMOUNT	Project Deposit - [Project Name]    (50% of total project fee of \$[X,XXX])	\$[X,XXX.XX]	Includes:    • [Workflow 1]    • [Workflow 2]    • Documentation & Training    • [X] Days Post-Launch Support			SUBTOTAL \$[X,XXX.XX]		TAX ([X]%) \$[XXX.XX]		<hr/>		TOTAL DUE \$[X,XXX.XX]		
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	<hr/>																
	TOTAL DUE \$[X,XXX.XX]																
<p>   PAYMENT METHODS:</p>																	
<p>   Bank Transfer:    Bank: [Bank Name]    Account: [Account Number]</p>																	

```
|| Routing: [Routing Number]  
||  
|| Credit Card:  
|| Pay online: [Payment Link]  
||  
|| Other: [PayPal, Wise, etc.]  
||  
||  
|| NOTES:  
|| • Payment due within [15] days of invoice date  
|| • Work begins upon receipt of payment  
|| • Questions? Contact [email]  
||  
|| Thank you for your business!  
||
```

## 2. Project Final Invoice

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INVOICE

Invoice #: INV-[XXXX]  
Date: [DATE]  
Due Date: [DUE DATE]

FROM: [Your Company Name] [Your Address] [Your Email] TO: [Client Company Name] [Client Address] [Client Email]

PROJECT: [Project Name] - FINAL PAYMENT

DESCRIPTION	AMOUNT
Project Completion - [Project Name] (Final 50% of total project fee)	\$[X,XXX.XX]
Delivered:	
[Workflow 1] - Completed	
[Workflow 2] - Completed	
Documentation Package	
Training/Handover Call	
[X]-Day Support Period Active	
Less: Deposit Paid (INV-[XXXX])	-\$[X,XXX.XX]
SUBTOTAL	\$[X,XXX.XX]
TAX ([X]%)	\$[XXX.XX]
BALANCE DUE	\$[X,XXX.XX]

PAYMENT: [Same methods as above]

Thank you for the opportunity to work together!



### 3. Monthly Retainer Invoice

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INVOICE																									
<p>   Invoice #: INV-[XXXX]    Date: [DATE]    Due Date: [DUE DATE]    Period: [MONTH YEAR]</p>																									
<p>   FROM: [Your Company Name] [Client Company Name]    [Your Address] [Client Address]    [Your Email] [Client Email]</p>																									
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|| Hours remaining/overage: [X]  
||  
|| See attached monthly report for details.  
||

||  
|| PAYMENT: [Same methods]  
||  
|| Thank you for your continued partnership!  
||

## 4. Change Order Invoice

INVOICE CHANGE ORDER	
Invoice #:	INV-[XXXX]-CO[X]
Date:	[DATE]
Due Date:	[DUE DATE]
Related Project:	[Project Name]
Original Agreement:	[Agreement #]
Change Order:	CO-[XXX]
DESCRIPTION	AMOUNT
Change Order: [Title/Description]	\$[X,XXX.XX]
Details:	
• [Item 1]	
• [Item 2]	
• [Item 3]	
Requested by:	[Client Name] on [Date]
Approved:	[Date]
	TOTAL DUE \$[X,XXX.XX]
NOTE: This change order is in addition to the original project scope and is billed separately.	

## 5. Payment Reminder Templates

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### First Reminder (Day 1 Past Due)

Subject: Friendly Reminder - Invoice #[XXXX] Due

Hi [Name],

Just a quick reminder that Invoice #[XXXX] for \$[X,XXX] was due on [Date].

If you've already sent payment, please disregard this message!

If not, you can pay here: [Payment Link]

Or contact me if there are any questions.

Thanks!

[Your Name]

### Second Reminder (Day 7 Past Due)

Subject: Payment Reminder - Invoice #[XXXX] - 7 Days Overdue

Hi [Name],

Following up on Invoice #[XXXX] for \$[X,XXX], which is now 7 days overdue.

Is there anything holding up payment? I'm happy to help if there are any questions or issues with the invoice.

Pay online: [Payment Link]

Please let me know the status.

Thanks,

[Your Name]

## Final Notice (Day 14+ Past Due)

Subject: URGENT: Invoice #[XXXX] - [X] Days Overdue

Hi [Name],

Invoice #[XXXX] for \$[X,XXX] is now [X] days overdue.

Per our agreement, late payments are subject to a [1.5%] monthly fee, and services may be suspended for accounts over 30 days past due.

Please remit payment immediately or contact me to discuss.

Pay now: [Payment Link]

I'd prefer to resolve this directly rather than escalate further.

Regards,  
[Your Name]

## Invoice Tracking Spreadsheet

INVOICE #	CLIENT	PROJECT	AMOUNT	DATE SENT	DUE DATE	STATUS	PAID DATE	NOTES
INV-0001			\$			Pending/ Paid/ Overdue		
INV-0002			\$					
INV-0003			\$					

Customize these templates with your branding and specific terms.

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