Professional Writing for Results

A Useful Guide to Business, Workplace, and Technical Writing

Nicolas Cooper, MFA

Sample chapter. Fairhand Press, El Paso, Texas

About this sample

This sample is Chapter 6 of Professional Writing for Results, printed in full. The book has an Orientation and 26 chapters. Each chapter gives a short set of numbered rules, worked examples in plain prose, and a fillable template with a finished model.

The Invoice Template this chapter uses is free in the Student Pack at fairhandpress.com/students, as a fillable PDF and a Word file.

Chapter 6. The Invoice and Getting Paid

Objective: Fill in an invoice correctly, state the payment terms, and follow up until it is paid.

An invoice is a request for payment; it says what was done, what it cost, and how to pay. In a small business, the person who did the work usually writes it; many skilled workers learned the trade, not the billing. So the invoice often ends up as a few lines in an email, sent late on a Sunday night.

That habit costs money because of where the invoice goes next. At any business larger than a few people, the invoice does not go to the person who hired you. It goes to an accounts payable office, where a clerk compares it with the purchase order and with the record of what was received. The clerk does not ask whether the work was good; the clerk asks whether this page matches the other pages. An invoice with no number, a different business name, or a vague description goes back into a pile. The payment waits until someone answers the question.

So write the invoice for that clerk. The same checks also protect the client. A business that pays whatever arrives can be robbed by anyone who can type an invoice; numbered, uniform invoices make a fake one easier to spot.

The invoice is also the purest template document in this book. The layout is fixed, and every invoice a business sends should look the same except for the entries. Your job is to fill in the fields correctly; the template does the rest.

Rule 28. Number, date, and itemize every invoice

Four documents deal with money at different moments, and their names are often confused.

- An **estimate** is an approximate price given before the work. The final amount may change.
- A **quote** is a firm price for a defined job, usually good for a stated period.
- An **invoice** is a request for payment, sent after the work or at an agreed stage of it.
- A **receipt** proves that a payment has already been made.

Every invoice has the same parts, in the same places. At the top are the business name and the word INVOICE with its number. Below them are the invoice date, a “Bill To” block for the client, and a “Payable To” block for the name payment should be made out to. The due date, the payment terms, and the balance due sit together where nobody can miss them. The body is a table of line items, each with a description, a quantity, a rate, and an amount. Under the table are the subtotal, the tax, and the total. Payment methods and notes go at the bottom.

The number. Invoices are numbered in sequence: 1041, 1042, 1043. That way, both sides can name the invoice in a call or an email, and the records can be checked for completeness. A gap in the sequence means an invoice was lost or deleted; a duplicate means the same work may have been billed twice. Bookkeepers and auditors look for both, because honest mistakes and fraud both show up there. Never reuse a number or skip one; if an invoice must be canceled, mark it void and keep it in the file.

The date. The invoice date starts the payment clock. Terms such as “net 15” (Rule 29) count from that date, so send the invoice when the work ends, not two weeks later. When the work spans more than one day, give each line its own service date.

The line items. Itemizing means breaking the total into lines that someone else can check. Compare two descriptions of the same work:

Weak: Event services, $2,400

Strong: DJ and sound service, Saturday, October 16, 2027, 7:00 p.m. to midnight, 5 hours at $360 Wireless microphones and podium setup, 1 at $300 Uplighting, 12 fixtures at $25

The clerk can match each strong line against the purchase order; the event manager can confirm that the uplighting was delivered. And a question about one line does not reopen the whole bill. When a signed agreement describes the work in full, the invoice can be shorter; its wording should still match the agreement closely enough that a stranger could connect the two.

The tax line. Keep the tax lines on every invoice, even when they read zero. Whether a service or product is taxed depends on the state, the city, and the kind of work. The template calculates the tax from the rate you enter, but it cannot tell you whether a line is taxable. Ask the state's revenue agency or a tax professional before the first invoice (Chapter 13).

Fake invoices. A uniform house invoice also protects the client. Between 2013 and 2015, Evaldas Rimasauskas registered a company in Latvia with the same name as a real hardware supplier to two large American technology companies. He then emailed employees at both companies, posed as the supplier, and sent forged invoices that moved payments to his own bank accounts. The companies sent more than $100 million before the scheme was caught; he pleaded guilty to wire fraud in 2019 and was sentenced to five years in prison (U.S. Attorney's Office, Southern District of New York, 2019). His invoices did not need to be perfect; they only needed to look ordinary. The change of bank account was the warning sign, and a phone call to a known number at the real supplier would have caught it.

So the lesson runs both ways. An accounts payable office confirms any change in payment details by calling a number already on file, never the number in the message (Chapter 3 makes the same point about AI-written fraud). A small business sends every invoice from the same address, in the same layout, with the next number in sequence. It also tells clients that its bank details will not change by email. A clerk who knows what your invoices look like will notice one that does not.

Rule 29. State the terms before you need them

Payment terms are the conditions under which the client pays. They belong in the agreement before the work begins and on every invoice after it. A term that first appears on an invoice is only a request; the client never agreed to it. A term from the signed agreement, repeated on the invoice, is a reminder of something already settled.

The common terms are few:

- **Due on receipt:** payment is expected when the invoice arrives.
- **Net 15** or **net 30:** the full amount is due 15 or 30 days after the invoice date.
- **Deposit:** a payment before the work begins, to reserve the date or cover costs in advance.
- **Late fee:** a charge for payment after the due date. It holds only if the client agreed to it beforehand, and some states limit the amount, so check before you put one in the agreement.

Event and creative businesses often use staged payments, agreed before the first invoice. A photographer or a DJ takes a deposit at booking, a second payment the week of the event, and the balance afterward. Each invoice then follows a schedule the client already accepted:

Invoice 1041: deposit, one third of the price, due on receipt, sent at booking Invoice 1046: second payment, one third, due on receipt, sent the Monday before the event Invoice 1052: balance plus any approved additions, net 15, sent the Monday after the event

The later invoices show what has been paid and what remains. That way, the client's office never has to rebuild the account from old emails.

The invoice supports the agreement; it does not replace it. If the price and the scope were never written down, the invoice is only one side's account of a conversation. Chapter 12 (Rule 50) explains why the agreement should be in writing.

Put every payment instruction on the page. For bank transfers, say how to get the account details. For checks, say whom to make them payable to and where to mail

them. If you want the invoice number in the payment memo, ask for it. A client cannot follow an instruction that was never written down.

The cover email. Send the invoice by email, as a PDF attachment, not by text or direct message (see the channel norms in Chapter 5). A text is fine for a quick question on the night of the event; the invoice needs a record that accounts payable can file. Before the first invoice, ask the client where invoices should go. Many businesses have a separate accounts payable address, and an invoice sent to the event manager may sit unopened for weeks.

Keep the cover email short, with the invoice number and the due date in the subject line:

Subject: Invoice 1052, balance due November 2

Dear Accounts Payable,

Attached is Invoice 1052 for sound and DJ services at the Harvest Gala on Saturday, October 16, 2027, under purchase order PDN-27-0388. The balance due is $1,160.00, net 15, due November 2, 2027. Payment instructions are on the invoice.

Thank you, Owner [Sound company] (915) 555-0164

The email names the invoice, the work, the purchase order, the amount, and the due date; those are the five things the clerk will search for. It says nothing the invoice does not also say.

Rule 30. Follow up firmly and politely

Most late payments are delays, not refusals. The invoice went to the wrong address, or the clerk sent it back for a missing purchase order number. The person who approves payments may be on vacation; the client's cash may be tight this month (Chapter 13). Waiting and hoping costs weeks, and an angry message can cost the client. A short series of polite, specific messages works better, each one a little more direct than the last.

Following up is the seller's job; the client's office will not notice that your invoice is missing. So mark each due date on a calendar when you send the invoice, and check for payment on that date.

Follow-ups are also a place where hedging gets in the way. "So sorry to bother you, I just wanted to maybe check in about the invoice if you get a chance" hides the question. A follow-up names the invoice, the amount, and the date, then asks one question. It is polite; it does not apologize.

The first follow-up goes out a few days after the due date. It assumes an honest delay:

Subject: Invoice 1052, balance due November 2

Dear Accounts Payable,

I am following up on Invoice 1052, sent October 18 for $1,160.00 and due November 2. Could you tell me whether it has been received and approved, or whether you need anything from me to process it? A copy is attached.

Thank you, Owner [Sound company]

The message gives the number, the amount, and the date. It attaches the invoice again, so nothing has to be searched for, and it asks one easy question.

If a week passes with no payment or reply, the second message makes a firm request and copies the person who hired you. If the agreement includes a late fee, it states the fee as a fact from the agreement:

Our booking agreement of August 2 provides for a late fee of $25 per month on balances more than 30 days past due. I would like to avoid applying it. Could you confirm a payment date by November 19?

The third step is a phone call to the person who approved the work; then send an email that records what was said (Chapter 11, Rule 47). Collection agencies and small claims court exist for the rare client who will not pay at all; both will first ask for the numbered invoices, the agreement, and the dated follow-ups.

A disputed line. If a client questions one charge, do not hold up the rest of the invoice. Answer with the evidence: the purchase order, the written approval, or the delivery record. If the charge was a mistake, issue a corrected invoice with a new number and a note that it replaces the earlier one; keep the original in the file, unchanged. If the charge is correct and still disputed, ask the client to pay the undisputed lines now while the one line is discussed.

Working from the template

The Invoice Template comes as a fillable PDF and a Word file. The blue fields are the only ones you fill in; everything else stays as it is. Every invoice a business sends should look the same except for the entries. Both versions and the instruction sheet are in the Chapter 6 folder of the Student Pack (fairhandpress.com/students).

Fill in the fields in this order:

1. **Business name or logo text:** set the same way on every invoice.
2. **INVOICE #:** the next number in your sequence. Keep a list of numbers used, with the client and date for each, so you can see the next number and spot any gap.
3. **Your name or business name:** exactly as it appears on your W-9 (Chapter 13), so the clerk's records match.
4. **Date:** the invoice date, written in full.
5. **Bill To:** the client's legal business name, the office it should reach (often Accounts Payable), and the billing address. The billing address may differ from the place where the work was done.
6. **Payable To:** the name payment should be made out to and, for checks, the mailing address.
7. **Due Date and Payment Terms:** the same fact two ways, such as "Net 15" and the calendar date it produces. Check that they agree.
8. **Line items:** one row per item, with a description that matches the purchase order or agreement, then Quantity and Rate. Add the service date when the work spans more than one day.
9. **Tax rate (%):** the rate that applies, or 0.
10. **Payment Methods:** what you accept and how to use each one.
11. **Notes:** anything the clerk needs that is not elsewhere, such as the purchase order number, the person who approved the work, and payments already received.

The form calculates each Amount, the Subtotal, the Tax, the Total, and the Balance Due. Those figures are only as good as the entries; a quantity typed as 50 instead of 5

will be multiplied exactly. So check every line by hand before sending; the form will not catch a typo. Under a staged schedule, enter earlier payments as line items with negative amounts; the balance then shows what remains.

Save each invoice as a PDF named with the number, the client, and the date (Rule 10). Keep it with the cover email and the record of payment, where you can find it when the client, a bookkeeper, or the IRS asks (Chapter 13, Rule 57).

The model

A completed balance invoice from a small sound and DJ company to an event venue. The venue booked the company on August 2, 2027, under a written agreement. The price was $2,400 for five hours of DJ and sound service, wireless microphones, and uplighting, paid in thirds: at booking, the week of the event, and the balance after the event, net 15. Additional hours were $360 each if approved in writing on the night. Invoices 1041 and 1046 were paid. During the event, the venue’s event manager asked by text at 10:40 p.m. for one more hour of music; the owner replied with the rate and kept the exchange. The owner sent the balance invoice on the Monday after the event.

[Sound company]

INVOICE # 1052

[Sound company] Date: October 18, 2027

Bill To: [Venue legal name] Attn: Accounts Payable [Street address] El Paso, TX [ZIP]

Payable To: [Sound company] [PO Box] El Paso, TX [ZIP]

Due Date: November 2, 2027 Payment Terms: Net 15 Balance Due: $1,160.00

Item: DJ and sound service, Harvest Gala, Saturday, October 16, 2027, 7:00 p.m. to midnight | Quantity: 5 hours | Rate: $360.00 | Amount: $1,800.00 Item: Additional hour, midnight to 1:00 a.m., approved by the event manager by text at 10:40 p.m. | Quantity: 1 hour | Rate: $360.00 | Amount: $360.00 Item: Wireless microphones and podium setup | Quantity: 1 | Rate: $300.00 | Amount: $300.00 Item: Uplighting fixtures | Quantity: 12 | Rate: $25.00 | Amount: $300.00 Item: Less deposit received, Invoice 1041, paid August 2, 2027 | Quantity: 1 | Rate: $(800.00) | Amount: $(800.00) Item: Less second payment received, Invoice 1046, paid October 12, 2027 | Quantity: 1 | Rate: $(800.00) | Amount: $(800.00)

Subtotal: $1,160.00 Tax rate (%): 0 Tax: $0.00 Total: $1,160.00

Payment Methods: Check payable to [Sound company], mailed to the address above; bank transfer, with account details confirmed by phone at (915) 555-0164. Our bank details will not change by email.

Notes: Purchase order PDN-27-0388. Services as described in the booking agreement of August 2, 2027. Please include the invoice number with your payment. Thank you for having us at the Harvest Gala.

What makes it work:

- **Number:** 1052 follows 1046; the numbers between went to other clients, so the company's own sequence is complete.
- **Bill To:** it goes to accounts payable, the office that pays, not to the event manager who booked.
- **Terms block:** the due date, the terms, and the balance due sit together, as the agreement set them.
- **Line items:** each original line matches the purchase order. The added hour names who approved it and when, so the clerk can check it against the text.
- **Payments received:** both earlier payments appear with their invoice numbers and dates, so nobody has to search old emails to confirm the balance.
- **Tax line:** it reads zero because the owner asked a tax preparer before the first invoice of the year. The line shows the question was answered.
- **Payment note:** it tells the venue how to pay, and how not to be fooled by a fake request.

The payment had not arrived by Friday, November 5, so the owner sent the first follow-up from Rule 30. The clerk replied that afternoon: the invoice had been held until the event manager confirmed the added hour. The payment arrived the following Wednesday.

The rules again

Number, date, and itemize every invoice. Use one numbered sequence with no gaps or reuses, date each invoice, break the total into lines that match the agreement, keep the tax lines, and confirm any change in payment details by a known phone number.

State the terms before you need them. Agree on the due date, deposits, staged payments, and any late fee before the work begins; repeat them on every invoice with payment instructions; and email each invoice where the client asked to receive it.

Follow up firmly and politely. Check for payment on the due date, send short and specific follow-ups that grow more direct, answer a disputed line with evidence and a corrected invoice, and let the undisputed lines be paid.

Recommended Assignment: Invoice, a completed invoice on the template for a real or realistic small service business. It needs a number in sequence, a Bill To and a Payable To, at least three itemized lines, payment terms, a due date, and a tax line, plus a short cover email to the client’s accounts payable address.

The complete course

The book comes with a complete curriculum for instructors: ready-to-import Canvas and Blackboard course shells in 16, 8, and 5 week versions, with assignments, calendars, 100-point rubrics, and discussion prompts. Students get every template free in the Student Pack, including APA and MLA paper templates, a résumé template, and the invoice template used in this chapter.

Instructors can request a review copy and the instructor code at fairhandpress.com/instructors.

Copyright 2026 Nicolas Cooper. Fairhand Press, El Paso, Texas.