

INVOICE & PAYMENT TRACKER

Get-Paid Pack

INVOICES

INVOICE / RECIPIENT	AMOUNT	AGREED DUE DATE / SOURCE	STATUS

STATUS GUIDE

DRAFT

SENT

AWAITING RESPONSE

PART PAID

PAID

THE STEPS

- ☐ Record the invoice
- ☐ Check the date
- ☐ Mark the status
- ☐ Choose a review date
- ☐ Keep the written follow-up clear
- ☐ Record the outcome

FOLLOW UP

STATUS	NOTES
 SENT	
 AWAITING RESPONSE	
 PART PAID	
 PAID	

KEEP TOGETHER

NEXT REVIEW DATE _____

FOLLOW-UP DRAFT _____

RESPONSE /
CONFIRMATION _____

EVIDENCE
LOCATION _____

TIPS AND REMINDERS

- Add one invoice and its next review date.
- Check recorded payment evidence before contacting the recipient. Continue from the next review row.
- After you try it: Can you tell which invoice needs a review and what has already been paid?

STATUS SYMBOLS



DRAFT



SENT



WAITING



PART



PAID

INVOICE & PAYMENT TRACKER

Record each invoice's reference, amount, agreed due date, and current status. Add the next follow-up date and keep the payment confirmation or response linked to the row.

THE STEPS

An Invoice and Payment Tracker With a Clear Follow-Up

A status such as “sent” is more useful when you also know when to review it and where the evidence is.

- | | |
|---|--|
| 1 RECORD THE INVOICE
Use the actual reference, recipient, amount, and agreed terms. | 2 CHECK THE DATE
Use the invoice and the agreement. Clients don't all have the same terms. |
| 3 MARK THE STATUS
Draft, sent, awaiting response, part paid, or paid. | 4 CHOOSE A REVIEW DATE
Write when you'll check the status again. |
| 5 KEEP THE WRITTEN FOLLOW-UP CLEAR
State the invoice reference and ask for the expected payment date. Verify the payment status before sending. | 6 RECORD THE OUTCOME
Update the row with the response or confirmation. Keep it in a known place. |

AN EXAMPLE

Fictional invoice INV-014: amount \$240, due date taken from the agreed invoice. Status Sent. Review after the due date if no payment is recorded. A message asks for the expected payment date; the tracker then records the client's response.

THE SMALLER VERSION

Add one invoice and its next review date.

WHEN YOU COME BACK

Check recorded payment evidence before contacting the recipient. Continue from the next review row.

AFTER YOU TRY IT

Can you tell which invoice needs a review and what has already been paid?

Examples on this page are made up. Use your own dates and details.