SMALL BUSINESS INVOICE & QUOTE KIT

A printable worksheet to prepare estimates, record payments and follow up confidently.

BUSINESS DETAILS

Business name: _____

Address / phone / email: _____

Tax / registration details (if applicable): _____

QUOTE / ESTIMATE

Quote number: _____ Date: _____ Valid until: _____

Customer name: _____ Contact: _____

Project / service: _____

Description	Qty	Rate	Amount

Subtotal: _____ Discount: _____ Tax (if applicable): _____

TOTAL QUOTED: _____

Terms / delivery timeline: _____

INVOICE & PAYMENT RECORD

Invoice number: _____ Invoice date: _____ Due date: _____
Customer / client: _____

Description	Qty	Rate	Amount

Subtotal: _____ Tax (if applicable): _____ Total due: _____
Payment received: _____ Balance due: _____
Payment method / reference: _____

PAYMENT FOLLOW-UP

Date	Follow-up / note	Next action

Adapt tax fields and invoice requirements to the rules that apply to your business. This worksheet is a planning aid, not tax or legal advice.