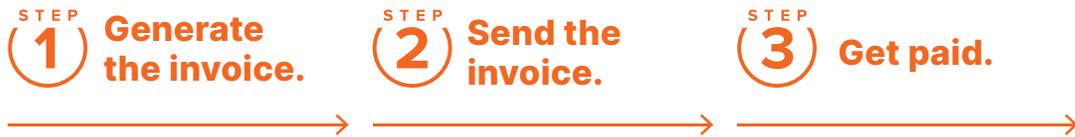

The Ideal Accounting Invoice Template

Get Paid Faster with Better Invoices

Let's Talk Invoices

On first glance, sending invoices seems like a fairly straightforward process.



As a result, many accounting firms overlook the importance of this particular client interaction.

Here's the truth: invoicing fails at most firms for simple reasons: Invoices go out late or inconsistently. They don't clearly connect the work done to the value delivered. They leave out key details or force clients into extra steps to pay.

In our experience, a bad invoice creates confusion, generates questions, and can create a negative client experience.

None of these issues feel "wrong" in the moment, but they compound over time. You'll see them show up as delayed cash flow, more email back-and-forth, and growing accounts receivable (AR).

A good invoice, on the other hand, provides clarity, answers questions before they come to you, and creates a positive client experience.

With the right elements in place, a strong invoice not only confirms the work performed, but it also protects cash flow, supports faster payment, and sets realistic expectations.

Improving your invoices even helps build loyalty. When clients feel informed and confident about what they're being billed for, they stick around and pay on time. And as one of the most consistent touchpoints clients see month after month, invoices are a true client experience asset with real financial impact.

So if you're looking for a great invoice template, you're in the right place.

In this resource, we're going to share two invoice formats that will serve two different kinds of clients. In addition, you'll learn **new methods to streamline your invoicing process and make it even easier to get paid.** We're going beyond the invoicing format to provide you with our best practices for not only your invoices themselves, but also the process you use to prepare invoices and collect payments.

So you can build a simple yet powerful invoicing system that clients love while helping you find efficiencies in your workflow.

A Quick Overview of This Resource

- 1 Invoicing Best Practices
- 2 Invoicing Mistakes to Avoid
- 3 Narrative Style + Preparation Checklist
INVOICE TEMPLATE 1
- 4 Detailed Style + Preparation Checklist
INVOICE TEMPLATE 2

8 Invoicing Best Practices for Accounting Firms

1. Keep the Formatting Simple

Invoices shouldn't be complex. Avoid overly-detailed paragraphs of text and multiple pages. Keep the design simple and easy to read. Highly designed invoices with a lot of images can look great, but can cause problems in email service providers. Instead, keep the design minimal, give your clients the information they need, and leave it at that.

Simple formatting also speeds up approval. When a client can scan the invoice in seconds and understand what it's for, they're far more likely to pay on time. When they can't, payment becomes a "do it later" task that's easier to overlook.

2. Tailor Your Invoice to Your Client

Not every client is the same. Some love to see all the details. Some want to see a stripped down version with a generic service summary and the costs. At Mango, we recommend sending one of two types of invoices: **Narrative** or **Detailed**.

The Narrative format is great for people who just want high level information. The Detailed format is best for people who love getting into the nitty gritty.

In our experience, the Narrative format is best for most business owners, and for when you're value billing. The Detailed format is best for when you're working with another accountant or when you're billing by the hour.

This is also about reducing questions. The right format prevents the predictable *"Can you explain this line item?"*

or “*Why did this take so long?*” emails. Match the invoice to how the client evaluates value and cost, and you remove friction before it starts.

3. Batch Your Invoicing to Save Hours Every Month

Stop invoicing your clients one at a time. Simply put, it’s a huge waste of time. With the right practice management software solution, you can shave hours off your monthly invoicing by knocking out all these activities at once.

For example, Mango allows you to create and edit invoices in batches from a single screen. Whether you’re value billing or billing by the hour, batching will make your invoicing process so much easier and much more efficient. We’ve found that this process can save 2-5 minutes per invoice!

Batching also improves your invoicing consistency. When invoices go out in a predictable cadence, clients learn what to expect and how to handle them. That consistency alone can reduce delays because invoices stop catching clients by surprise.

4. Integrate Your Time-Tracking, Invoicing, and Payments

If you’re billing straight out of QuickBooks (or a similar platform) you’re missing a huge opportunity. One of the greatest areas for increasing efficiency and reducing AR in accounting firms is to integrate your time-tracking and billing with a one-click payment solution.

By making it easier for clients to pay directly through the invoice, people pay more quickly. It’s a win-win-win. It’s easier to create accurate invoices quickly, you get paid sooner, and your clients have a better experience.

Integration cuts down on errors and rework, too. When your time entries, services, and expenses flow directly into each invoice, you spend less time entering the details, fixing small mistakes, or rebuilding invoices at the end of the month. That's the shortest path to cleaner invoices, fewer client questions, and getting paid.



[Book a demo](#) of Mango Practice Management to explore adding this functionality to your firm.

[SCHEDULE A DEMO](#)

5. Work Towards “Zero AR”

You've provided a service, and you deserve to get paid for it promptly. That's why we're big fans of the “Zero AR” concept for accounting firms.

Zero AR is less about hoping clients pay faster and more about building a process that makes fast payment the default. That starts with consistent invoice timing, clear terms clients can understand at a glance, and an easy way to pay directly from the invoice.

Instead of waiting for weeks or months for payments (which is basically providing an interest-free loan to your clients!) use a payment solution integrated into your time and billing software so you can get paid right away.

By establishing this expectation up-front with your clients, invoices stop lingering and you can effectively reduce your AR to zero.

6. Send Invoices as Soon as Work is Completed

Timing is everything in billing. The longer you wait to invoice, the harder it is for clients to connect the bill to the work (and the easier it is for payment to slip down the priority list). Delayed invoicing hurts your firm, too. Details get fuzzy, time entries get messy, approvals take longer, and small questions turn into long email threads.

Sending invoices right after work is completed solves these problems. Clients recognize the work and approve it faster because it's still fresh. Billing disputes drop because the timeline is clear. The cash cycle shortens because there's less lag between delivery and payment.

Even if monthly billing is standard for your firm, invoicing "immediately" might just mean "promptly and consistently." The goal is to shorten the gap between the work and the bill, so invoices don't show up weeks later after everyone has moved on.

7. Standardize Your Invoices (and Automate Where You Can)

Standardization flips invoicing from a recurring scramble into a repeatable system. If you build every invoice from scratch, the quality varies, time gets wasted, and clients see different formats each time. But when invoices follow consistent rules, your team moves faster and clients know exactly what they're looking at.

Standardizing does not mean making your invoices look generic. It means setting firm-wide defaults that every bill follows:

- ✔ **Consistent service** naming so line items make sense month to month.
- ✔ **Consistent language** so clients get fewer surprises and fewer questions.
- ✔ **Consistent structure** so totals, terms, and due dates always appear in the same place.
- ✔ **Consistent workflow** steps so invoices don't sit waiting for review or sending.

Automation makes this easier by removing the manual steps that slow you down, and Mango has a few features that support this in a very practical way.

For example, you can use custom templates to generate invoices from time records, create batch invoices from a single screen, and set up recurring invoices for clients you bill the same way every period. When you want full control over what shows up on the invoice (narrative or detailed), Mango also supports manual invoicing.

The more you lean on automation with templates, batching, and recurring billing, the easier it becomes to send clear invoices consistently without adding extra work for your team.

8. Make Paying the Easiest Step with Online Payments

A great invoice can still get paid late when paying it feels like an extra chore. If a client has to hunt down a checkbook or set up a bank transfer, your invoice becomes a “later” problem. **Online payments remove that friction.**

When clients can click a link from the invoice and pay in minutes, the gap between “approved” and “paid” shrinks, and your team spends less time sending reminders. Using a tool like Mango Payments, you can make sure every invoice includes a clear “Pay now” link, clients receive automatic confirmation receipts, and the payment experience works just as smoothly on a phone as it does on a desktop.

Letting clients pay online is one of the simplest ways to reduce AR and make billing feel like a modern checkout experience for clients.

8 Common Invoicing Mistakes to Avoid

Even strong accounting firms run into the same avoidable invoicing mistakes. The good news is they’re easy to spot and even easier to fix once you know what to look for:

1. **Sending invoices late or inconsistently.** The longer you wait, the less real the work feels to the client. Invoices that show up unpredictably get treated like background noise, not a priority.
2. **Using vague service descriptions that trigger questions.** “Accounting services” doesn’t cut it. Clear, client-friendly language prevents the questions that delay payment.
3. **Burying payment terms so clients miss the due date.** If the due date and terms require combing through the bill, clients won’t hunt. Put the terms where the eye naturally goes, so expectations stay obvious.
4. **Forgetting invoice numbers or dates.** This turns every follow-up into a scavenger hunt. Clean identifiers make it easy for clients to approve, pay, and reference the right invoice fast.

- 5. Making clients jump through hoops to pay.** Checks, bank transfers, and separate portals add friction that slow down payment. A simple online payment option keeps momentum.
- 6. Experimenting with formatting.** Using a new, unexpected format can confuse clients and slow approvals. Consistent formatting builds trust and speeds up review.
- 7. Adding surprise charges with no context.** Unexplained add-ons or expenses make clients pause, ask questions, and dispute. Quick notes and clear grouping prevent sticker shock and keep approvals moving.
- 8. Leaving invoices “open” with no next step.** An invoice that doesn’t clearly say how to pay, when it’s due, and who to contact for questions invites procrastination. A clear call to action keeps the process moving.

ACCOUNTING INVOICE TEMPLATE #1

Narrative Style

Narrative style invoices give your clients high-level information.

Think of this as the “basic” version. It’s a great tool to use when customers don’t care too much about every little detail of what you did, they just want to know the general details and what they owe you. This format is best when working with non-accounting-minded business owners or when value billing.

Imagine Time, Inc.
1234 South School
Los Angeles, CA 95487
(877) 520-1525

AAA Electric - Accounting Department
234 Somewhere Ave
Lincolnton, NC A2a 687

INVOICE
Invoice Date: Mar-28-2022
Invoice Number:
Payment Terms: Upon Receipt

ACCOUNTING SERVICES (Summary of Services)

Date	Staff	Description	Hours	Rate	Amount
01-09-22	PS	1290 - Monthly Bookkeeping Services	1.00	\$ 200.00	\$ 200.00
01-25-22	CI		0.25	\$ 25.00	\$ 6.25
01-25-22	CI	1290 - Monthly Bookkeeping Services	0.75	\$ 175.00	\$ 131.25
01-26-22	PS	1290 - Monthly Bookkeeping Services	0.17	\$ 200.00	\$ 34.00
01-26-22	PS	1290 - Monthly Bookkeeping Services	2.00	\$ 200.00	\$ 400.00
01-27-22	PS	1290 - Monthly Bookkeeping Services	1.00	\$ 200.00	\$ 200.00
01-27-22	PS	1290 - Monthly Bookkeeping Services	0.17	\$ 200.00	\$ 34.00
01-31-22	PS	Assembly	1.00	\$ 100.00	\$ 100.00
01-31-22	PS	1290 - Monthly Bookkeeping Services	0.17	\$ 200.00	\$ 34.00
02-01-22	PS	1290 - Monthly Bookkeeping Services	2.75	\$ 200.00	\$ 550.00
02-01-22	PS	1290 - Monthly Bookkeeping Services	0.17	\$ 200.00	\$ 34.00
02-01-22	PS	1290 - Monthly Bookkeeping Services	1.00	\$ 200.00	\$ 200.00
02-08-22	PS	1290 - Monthly Bookkeeping Services	3.00	\$ 200.00	No Charge
02-08-22	PS	payroll	0.17	\$ 250.00	\$ 42.50
Sub-Total					\$ 1,966.00

ACCOUNTING SERVICES (Summary of Expenses)

Date	Description	Amount
01-26-22	PS test	\$ 0.00 \$ 150.00
02-01-22	PS Mileage	\$ 0.00 \$ 5.00
02-10-22	PS Postage	\$ 0.00 \$ 50.00
02-22-22	PS Next Day Delivery	\$ 0.00 \$ 250.00
Sub-Total		\$ 455.00

Monthly Bookkeeping (Summary of Services)

Date	Staff	Description	Hours	Rate	Amount
12-20-21	CI	1290 - Monthly Bookkeeping Services	2.50	\$ 100.00	\$ 250.00

Thank you for your Business during this Tax Season

Imagine Time, Inc.
1234 South School
Los Angeles, CA 95487
(877) 520-1525

AAA Electric - Accounting Department
234 Somewhere Ave
Lincolnton, NC A2a 687

INVOICE
Invoice Date: Mar-28-2022
Invoice Number:
Payment Terms: Upon Receipt

Monthly Bookkeeping (Summary of Expenses)

Date	Description	Amount
12-20-21	PS Test	\$ 0.00 \$ 275.00
Sub-Total		\$ 275.00

1040 Personal (Summary of Expenses)

Date	Description	Amount
03-28-22	PS Consultation Fee	\$ 0.00 \$ 150.00
Sub-Total		\$ 150.00

Total Services \$ 3,096.00
Total Expenses \$ 880.00
Sales Tax \$ 317.40
Invoice Amount Due \$ 3,096.00
Previous Balance \$ 121,686.81
Total Balance Due \$ 124,782.81

Thank you for your Business during this Tax Season



QUICK INVOICE CHECKLIST

Narrative Style Invoice

Make Sure Each Invoice Includes

- Your Company Name and Contact Information
- Your Client's Company Name and Address
- Invoice Date
- Invoice Number
- Payment Terms
- Summary of Services
 - Individual and Total Amounts Required for Each Service
 - Relevant Dates
- Summary of Expenses (If Applicable)
 - Date of Expense
 - Description of Expense
 - Individual and Total Amounts of Each Expense
- Polite Sign-Off

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☑ **Why the Elements Matter**

Your Company Name and Contact Information

sets trust and gives clients an easy way to ask the right question to the right person. It also reinforces professionalism and reduces confusion when invoices get forwarded internally.

Your Client's Company Name and Address ensures the invoice routes correctly, especially for clients with multiple entities, locations, or billing departments.

Invoice Dates anchor the billing timeline and helps clients understand when the clock starts for payment terms.

Invoice Numbers make tracking and client communication easier. When a client says "I have a question," the invoice number prevents a long back-and-forth.

Payment Terms prevent delays caused by uncertainty. Clients pay faster when due dates and expectations are obvious.

A Summary of Services offers clarity at a glance, reduces questions, and reinforces the value you've delivered.

A Summary of Expenses prevents surprises and makes the invoice easier to approve.

Polite Sign-Offs build trust and keep the invoice from feeling too abrupt or purely transactional.

ACCOUNTING INVOICE TEMPLATE #2

Detailed Style

Detailed Style invoices give your clients the nitty gritty details.

Think of this as the “thorough” version. As its name suggests, it provides a more detailed breakdown of all of the work that was done, by whom, how long it took, and more. It’s a good option for customers who prefer to see a lot of granularity around their billing reports. This format is best when working with an accounting-minded person or when billing by the hour.

ImagineTime, Inc.
1234 South School
Los Angeles, CA 95487
(877) 520-1525

INVOICE

AAA Electric - Accounting Department
234 Somewhere Ave
Lincolnton, NC A2n 6B7

Invoice Date: Mar-28-2022
Invoice Number:
Payment Terms: Upon Receipt
Client Number: AAAE

Summary of Services:

Description	Amount
Accounting services for the month of (thru 03-28-2022)	\$ 250.00
ACCOUNTING SERVICES (thru 03-28-2022)	\$ 1,966.00
ACCOUNTING SERVICES - engagement type description for the month of March 2022 (thru 03-28-2022)	
Total Services:	\$ 2,216.00

Summary of Expenses:

Date	Description	Amount
12-20-21	Test	\$ 275.00
01-20-22	test	\$ 150.00
02-01-22	Mileage	\$ 5.00
02-22-22	Next Day Delivery	\$ 250.00
02-10-22	Postage	\$ 50.00
03-28-22	Consultation Fee	\$ 150.00
Total Expenses:		\$ 880.00

Thank you for your Business during this Tax Season

Sales Tax: \$ 317.40
Amount Due: \$ 3,096.00
Previous Balance: \$ 121,686.81
Total Balance Due: \$ 124,782.81

Thank you for your Business during this Tax Season



QUICK INVOICE CHECKLIST

Detailed Style Invoice

Make Sure Each Invoice Includes

- Your Company Name and Contact Information
- Your Client's Company Name and Address
- Invoice Date
- Invoice Number
- Payment Terms
- Summary of Services
 - Date Each Service Was Performed
 - Staff Member Who Performed the Service
 - Description of Service
 - Number of Hours
 - Billable Rate
 - Individual and Total Amounts Required for Each Service
- Summary of Expenses (If Applicable)
 - Date of Expense
 - Staff Member Who Incurred the Expense
 - Description of Expense
 - Individual and Total Amounts of Each Expense
- Polite Sign-Off

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☑ **Why the Elements Matter**

A detailed Summary of Services gives the client the full story behind the bill. Instead of a high-level label, it shows what was done, when it happened, who did it, how long it took, and how the total was calculated. This level of detail answers the “What am I paying for?” question upfront, which makes approvals faster and reduces back-and-forth.

A detailed Summary of Expenses honors transparency and keeps reimbursable costs defensible. Listing each expense with the date, the staff member, and a clear description makes it easy for the client to understand what it was for, confirm it aligns with the engagement, and approve it without extra questions.

Ready to Supercharge Your Invoicing?

Save Time, Get Paid, and Get Back to Your Real Work with Mango Practice Management.

Invoicing works best when it runs like a system, not a monthly scramble. Mango helps you standardize how invoices get built, reviewed, and sent, so your team spends less time assembling bills and more time closing out work.

With easy workflows that cut manual steps, speed up approvals, and let clients pay with a click, cash comes in closer to the day the work gets done.

The Truly All-in-One Practice Management Software Built by Accountants, for Accountants

- Secure File Sharing
- Document Management
- Electronic Signatures
- Payments
- Time Tracking
- Billing
- Custom Workflows
- Plug-and-Play Workflow Templates
- Due Date Management

Turn invoicing into a smooth, repeatable process for your team and your clients. Book a demo today or start your free trial below.

[BOOK A QUICK DEMO](#)

[GET STARTED FOR FREE](#)