CLIENT PAYMENT FOLLOW-UP BOARD

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 Write a non-sensitive invoice reference and the next action date.

STEP 2 Record communications factually; do not mark paid without reconciliation.

STEP 3 Store invoice copies, contracts and bank records in appropriate systems.

STEP 4 Which fact or document still needs checking?

CLIENT PAYMENT FOLLOW-UP BOARD

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

NEXT FOLLOW-UP DATE	INVOICE REFERENCE / CLIENT CODE	ASSIGNED FOLLOW-UP PERSON	INVOICE FOLLOW-UP STAGE	BALANCE VERIFICATION OR NEXT ACTION

Outstanding question or record to confirm

CLIENT PAYMENT FOLLOW-UP BOARD

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 Write a non-sensitive invoice reference and the next action date.

Concrete next action	Owner / due

ACTION 2 Record communications factually; do not mark paid without reconciliation.

Concrete next action	Owner / due

ACTION 3 Store invoice copies, contracts and bank records in appropriate systems.

Concrete next action	Owner / due

IMPORTANT CONTEXT

A 'Done' follow-up does not prove a payment was received, nor does it replace accounting records.

- [ ] Source checked
- [ ] Next action assigned