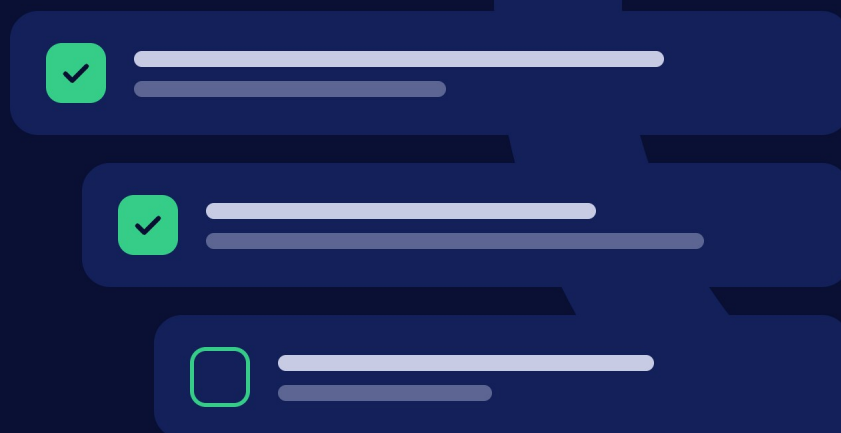




UK E-INVOICING CHECKLIST

Getting ready for e-invoicing in the UK

A detailed checklist for the e-invoicing rules that affect finance teams and accountancy firms from April 2029.

Who it's for

Designed for both finance teams and accounting companies

5 phases

From what to do now to what to check after go-live

52 actions

Each with a suggested owner, plus a section for accountants advising clients

What's changing

From **April 2029**, VAT invoices between UK businesses will have to be sent and received as e-invoices. That means structured data sent through the Peppol network, not PDFs or paper. The government is expected to publish the detailed roadmap at the Autumn Budget.

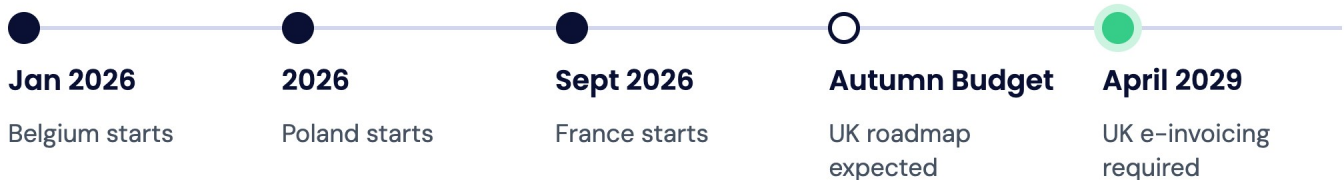
What is an e-invoice?

Invoice data in a set format that software can read directly. A PDF attached to an email is not an e-invoice.

What is Peppol?

An international network for sending e-invoices between businesses. You connect to it through a service provider, called an access point.

The UK isn't first



The direction is settled. The details are still to come, so this checklist covers what you can do now and what to do once the rules are published.

What it means for accounts payable

TODAY: PAPER AND PDF

Someone opens the post, checks the PDF and re-types the figures.

These manual steps often catch a wrong or fake invoice by accident.

WITH E-INVOICING

Invoices arrive as data, straight into your systems. Less keying, faster processing.

The accidental checks disappear. Nothing checks an invoice unless you've decided who does.

Getting ready is as much about your controls as your software.

Quick readiness check

Answer yes or no. Every "no" is a place to start.

	QUESTION	YES	NO
01	Do you know how many invoices you receive each month, and in what format?	☐	☐
02	Do you know which of your suppliers already use e-invoicing?	☐	☐
03	Has your accounting software provider told you their e-invoicing plans?	☐	☐
04	Is one person responsible for e-invoicing preparation?	☐	☐
05	Are your supplier names, VAT numbers and bank details up to date?	☐	☐
06	Is every invoice approved by the right person before it's paid?	☐	☐
07	Do larger invoices automatically need a second approver?	☐	☐
08	Could you show an auditor who approved any invoice, and when?	☐	☐

Your "no" answers: start with these in Phase 1 and Phase 3.

How this checklist is organised

PHASE 1

Now, before the roadmap

Page 4

PHASE 2

When the roadmap is published

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PHASE 3

Get your data, controls and systems ready

Pages 6 and 7

PHASE 4

The final months before April 2029

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PHASE 5

After go-live

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ADVISERS

If you advise clients

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PHASE 1

Now, before the roadmap

Understand where you stand. None of this depends on the final rules.

ACTION	WHO
☐ Name one person to own e-invoicing preparation	Finance lead
☐ Count the invoices you receive each month, and how many arrive as paper, PDF or email	Accounts payable
☐ Count the invoices you send each month, and in what format	Accounts receivable
☐ List the suppliers that already send e-invoices or use Peppol	Accounts payable
☐ List the customers likely to want e-invoices from you	Accounts receivable
☐ Map how a supplier invoice moves today, from arrival to payment	Accounts payable
☐ List every system an invoice touches: accounting, capture, approval, payment and banking	Finance lead / IT
☐ Ask your accounting software provider about their e-invoicing and Peppol plans	Finance lead
☐ Write down who approves invoices today, and up to what amount	Finance lead
☐ Brief leadership on what's changing and when	Finance lead

Your starting numbers

Invoices received each month

Of those, arriving as paper, PDF or email

Invoices sent each month

Suppliers already using e-invoicing or Peppol

PHASE 2

When the roadmap is published

Turn the rules into a plan.

ACTION	WHO
☐ Read the roadmap and note the dates, scope and any thresholds that apply to you	Finance lead, with your accountant
☐ Confirm which of your invoices are in scope	Finance lead, with your accountant
☐ Decide how you'll connect to Peppol: through your accounting software or a separate service provider (an access point)	Finance lead / IT
☐ Compare providers on cost, integration with your software, and support	Finance lead / IT
☐ Set a budget for any software or provider costs	Finance lead
☐ Build a project plan with milestones counted back from April 2029	Project owner

Two ways to connect to Peppol

Option A: through your accounting software

Ask your provider whether it will connect to Peppol for you, and when.

Option B: a separate access point

A service provider connects you to Peppol and passes e-invoices into your systems.

Either way, compare on cost, how well it works with your software, and the support you'll get.

Your milestones, counted back from April 2029

Provider chosen

Data and controls ready

Testing finished

Switch-over date

PHASE 3

Get your data, controls and systems ready

Supplier and customer data

ACTION	WHO
☐ Check legal names, VAT numbers and addresses for every active supplier	Accounts payable
☐ Remove duplicate and inactive supplier records	Accounts payable
☐ Confirm supplier bank details, and agree how changes will be verified	Accounts payable / Finance lead
☐ Collect your customers' e-invoicing details	Accounts receivable

Approval controls

ACTION	WHO
☐ Make sure every invoice is approved before it's paid, not after	Finance lead
☐ Set approval limits by amount, with a second approver above a set level	Finance lead
☐ Separate duties so no one can raise and approve the same invoice	Finance lead
☐ Route each invoice to the budget holder for the cost it relates to	Finance lead
☐ Match invoices to purchase orders where you use them, and decide what happens when they don't match	Accounts payable
☐ Keep a record of who approved each invoice, and when	Finance lead

E-invoices move faster than paper. Approval controls are what make sure each one is still checked by the right person before it's paid.

PHASE 3 Get your data, controls and systems ready (continued)

Payment controls

ACTION	WHO
☐ Verify any change to a supplier's bank details using a contact you already trust, not the details on the request	Accounts payable
☐ Require a second approval for payments above a set amount	Finance lead
☐ Arrange approval cover for holidays and absences	Finance lead

Systems and testing

ACTION	WHO
☐ Connect to your chosen Peppol provider and set up your accounting system	IT / Finance lead
☐ Test sending and receiving e-invoices with a few willing suppliers and customers	Accounts payable / receivable
☐ Test how e-invoices flow into approval and on to payment	Accounts payable
☐ Decide how you'll handle e-invoices that fail checks or get rejected	Accounts payable

People

ACTION	WHO
☐ Train your accounts payable and receivable teams on the new process	Finance lead
☐ Write a one-page process note: who does what, and what happens with exceptions	Project owner
☐ Tell suppliers and customers when and how you'll switch	Accounts payable / receivable

PHASE 4

The final months before April 2029

ACTION	WHO
☐ Confirm every system and provider is live and tested	Project owner
☐ Run a final check of supplier and customer data	Accounts payable / receivable
☐ Confirm approval limits and approvers are current	Finance lead
☐ Agree a fallback for anything not ready on day one	Finance lead
☐ Set the switch-over date and tell the team	Project owner

PHASE 5

After go-live

ACTION	WHO
☐ Review rejected or failed e-invoices every week for the first few months	Accounts payable
☐ Check that approvals aren't slowing down payment	Finance lead
☐ Spot-check that every paid invoice had the right approval	Finance lead
☐ Review approval limits whenever budgets or teams change	Finance lead
☐ Keep up with HMRC guidance as it's updated	Finance lead / your accountant

Key dates for your team

Switch-over date

First approval-limit review

FOR ACCOUNTANTS AND ADVISERS

If you advise clients

Clients are already asking what e-invoicing means for them. Use this as the start of a readiness review.

ACTION	WHO
☐ List the clients affected, and roughly how many invoices each handles	Practice
☐ Rank them by risk: paper or PDF heavy, high volume, or weak approval controls	Practice
☐ Share this checklist and book readiness conversations with the highest-risk clients first	Client lead
☐ Check each client's accounting software plans for e-invoicing and Peppol	Client lead
☐ Help clients clean supplier data and set approval controls ahead of the switch	Client lead
☐ Note the roadmap date and plan a second round of reviews once the rules are published	Practice

Three signs a client needs to start first



Paper or PDF heavy

Most invoices still arrive by post or as email attachments.



High volume

Many invoices each month, so any change to the process affects a lot of work.



Weak approval controls

No clear approvers, limits or record of who approved what.

Where ApprovalMax fits

ApprovalMax isn't an e-invoicing or Peppol service. It's the approval step that sits on top of your accounting system. As invoices go digital and move faster, that's the step that keeps control in place.

STEP 1

Routed

Every bill and purchase order goes to the right approver.

STEP 2

Checked

Each one is checked against your approval rules.

STEP 3

Recorded

Who approved it, and when, is recorded before it's paid.

The checklist items it helps with

- ✓ Every invoice approved before it's paid, not after
- ✓ Each invoice routed to the right approver
- ✓ Invoices checked against your approval rules
- ✓ A record of who approved each invoice, and when

Works with

Xero

QuickBooks Online

NetSuite

See how it works

Start a free trial at app.approvalmax.com/register



SOURCES

UK e-invoicing consultation outcome (GOV.UK: HMRC and the Department for Business and Trade): gov.uk/government/consultations/promoting-electronic-invoicing-across-uk-businesses-and-the-public-sector

Government press release on the e-invoicing plans: gov.uk/government/news/government-sets-out-plans-for-e-invoicing-overhaul-to-cut-paperwork

EU country mandates: Belgium (January 2026), Poland (2026), France (September 2026)