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Recurring invoices and payment reminders: automating the follow-up for a service business

Ideas & Everyday Automations

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Recurring invoices and payment reminders: automating the follow-up for a service business

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In a service business (retainers, maintenance, monthly fees) **it pays to automate issuing the invoice and the payment reminder**, and keep by hand only what needs judgement: a dispute, a customer in difficulty, a service to suspend. Nearly everything else is repetition.

What automates well, and what does not

Task	Automate?	Why
Generating each period's invoice	Yes	The data is the same every month: customer, service, amount.
Sending the invoice by e-mail	Yes	It must always go out on the same date.
A reminder before the due date	Yes	A friendly nudge prevents many late payments.
A reminder after the due date	Yes, with a rising tone	Cordial first, firmer later.
Marking the invoice as paid	Only with a check	Transfers and mobile payments need the amount and reference confirmed.
Suspending the customer's service	No, or only after a person looks	A mistake in a rule can cut off a customer who paid.

How to set it up

1. **Choose where the invoice lives.** Some invoicing programs have recurring invoices and reminders built in; a spreadsheet with a script is fine for a few customers. Either way, issuing invoices has legal requirements that depend on your country and tax authority: confirm with your accountant before you automate.

2. **Keep a list of recurring customers** with the service, the amount, the issue day and the billing e-mail. It is the source of everything else.

3. **Write three messages**: before the due date, on the day, after. Each short, with the invoice number, the amount, the date and how to pay. Choose on which days they go out; that is your call.

4. **Schedule the sending.** With the invoicing tool, with a cron job and a script, or with n8n. See **n8n Schedule Trigger or a cron job**.

5. **Mark as paid by hand, or with a check.** Until that is right, the reminder reaches people who have already paid, and that spoils the relationship.

6. **Review once a month** the list of those who got a reminder and confirm the rule did what it should.

The wrong reminder costs more than the missing one.
Sending “payment overdue” to someone who paid yesterday loses trust. Send overdue messages only after the payments list is up to date, and let the customer reply to a person.

Collection e-mails have to arrive too. If they land in junk, the automation is pointless: see **how to write an e-mail that does not land in spam**. If you sell through an online shop, customer invoices have their own route: **invoices for your shop customers**.

Start with the reminder before the due date only.
It carries the least risk and prevents the most late payments. Add the overdue ones afterwards.

RECOMMENDED

Want to run your automations on a server of your own? See the VPS plans.

See the VPS servers →

SEE ALSO

- Which tasks are worth automating first
- Adding a human approval step to an automation
- Invoices for your shop customers

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