



Invoice Tracking Agent

Monitors outstanding invoices and sends automatic payment reminders at defined intervals.

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1 AT A GLANCE

AREA	Finance
TRIGGER	Daily check of your open invoices
RESULT	Automatic payment reminders and a clear overview
INTEGRATIONS (EXAMPLES)	Accounting / invoice list Gmail / Outlook Notion / Airtable

2 HOW THE WORKFLOW RUNS



1 Collect invoices

The agent reads in your open invoices, for example from your accounting software or an invoice list.



2 Check due dates

Every day it checks the due dates and spots overdue invoices.



3 Send friendly reminders

At set intervals, for example 3, 10 and 20 days after the due date, a friendly reminder goes out.



4 Match payments

As soon as an invoice is marked as paid, the reminders stop automatically.



5 Show the overview

You get an overview with the status of all open and overdue invoices.

You set the intervals and tone. You decide sensitive cases yourself.

IDEAL FOR

- ✓ Freelancers and SMEs who send their own invoices
- ✓ Businesses with many small invoices
- ✓ Anyone who finds chasing payments uncomfortable

CUSTOMISABLE

- ✓ Intervals and number of reminders
- ✓ Tone and content per reminder level
- ✓ Exceptions for specific clients

WHAT YOU NEED

- ✓ A source for open invoices (accounting or a list)
- ✓ An email account for sending
- ✓ Your payment terms and preferred intervals

PRIVACY & SECURITY

- ✓ Access to invoice data only, not to bank accounts
- ✓ Sent from your own sender address
- ✓ No debt collection, no sharing with third parties

YOUR CONTROL You can exclude clients and approve every reminder in advance.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

Interested in this workflow?

In a free intro call we look at how the workflow can be adapted to your tools.

Book an intro call