⏱️ 15 MIN SETUP

Automatic Overdue Invoice Reminders in Xero and QuickBooks

Part of our Small Business Automation guide: what to automate first and the 10 easiest wins.

The problem

Chasing unpaid invoices is awkward and easy to put off. Automatic reminders go out on schedule, so you get paid faster without the uncomfortable calls.

What you need

- Xero or QuickBooks Online

Setup with Zapier

1. **Xero:** go to **Business, Invoices**, then the **Invoice reminders** setting, and turn reminders on. [Screenshot]
2. Set reminders at 3 days before the due date, on the due date, and 7 and 14 days overdue.
3. Edit each email's wording (see the template below).
4. **QuickBooks:** go to **Settings, Account and settings, Sales, Reminders**, turn on automatic reminders and set the timing.
5. Send a test invoice to yourself to check it.

Setup with Make

1. Only needed for extra channels such as SMS: trigger with **Xero, Watch Invoices** (status overdue) or the QuickBooks equivalent.
2. Add **Twilio, Create a Message** for a short SMS nudge.
3. Run it daily.

Message template

> Hi [Name], a friendly reminder that invoice [number] for [amount] was due on [date]. You can pay here: [link]. Already paid? Thanks, and please ignore this.

Consent and local rules

Payment reminders for an existing debt are transactional, not marketing. Keep the tone factual and polite, and follow local debt-collection rules. This isn't legal advice.

FAQ

Will automatic invoice reminders annoy clients?

Polite, well-spaced reminders are normal business practice. Keep the tone friendly and factual, and include an easy way to pay. Often a client has simply forgotten, and a reminder is all it takes.

Can I turn reminders off for one client?

Yes. Both Xero and QuickBooks let you switch reminders off per contact. That's useful for clients on a payment plan or with special terms.

Do I need Zapier for invoice reminders?

No. Xero and QuickBooks both have reminders built in, so you only need Zapier or Make if you want extra channels like SMS. Start with the built-in reminders.

How many reminders should I send?

This guide uses one before the due date, one on the day, and two after it’s overdue. Stop once the invoice is paid, which the built-in reminders do automatically.

Related

- Automation for tradies: all the easy wins
- Xero automatic payment reminders: schedule and wording
- Quote follow-up sequence
- Monthly KPI dashboard in Google Sheets
- Overdue invoice reminders template pack (Xero + QuickBooks)
- Get it ready-made

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One-page checklist: Overdue invoice reminders (Xero/QuickBooks)

- ☐ Xero: go to Business, Invoices, then the Invoice reminders setting, and turn reminders on.
- ☐ Set reminders at 3 days before the due date, on the due date, and 7 and 14 days overdue.
- ☐ Edit each email's wording (see the template below).
- ☐ QuickBooks: go to Settings, Account and settings, Sales, Reminders, turn on automatic reminders and set the timing.
- ☐ Send a test invoice to yourself to check it.

Consent note: only message people who have contacted you or agreed to hear from you, and include a way to opt out. This isn't legal advice.

Full guide: https://www.automatequick.com/guides/overdue-invoice-reminders