FREE ONE-PAGE KIT

Test an invoice-reminder tool before you pay for one

An invoice-reminder tool nudges customers who have not paid. Before you pay, ask 11 questions, send 4 test invoices, and try it on a few real late invoices for 7 days.

1. Ask the maker (11 questions)

1. What does it cost each month? Is the price per user, per invoice, or per customer?
2. Which accounting or invoice software does it connect to?
3. Can I set the schedule: before the due date, on the due date, and after?
4. Can I change the words? Does it have a friendly tone and a firm tone?
5. How does it know an invoice was paid? How long until it knows?
6. Does the reminder include a link so customers can pay right away? What does the payment cost?
7. Does it send from my own email address?
8. Can I pause reminders for one customer?
9. How does it handle part payments?
10. Can I see a list of who is late and every reminder that was sent?
11. Is there a contract? How do I cancel? Can I export my invoices and my data?

2. Send 4 test invoices

Make small test invoices to yourself (a $1 job works). Set each one to be due yesterday.

1. Invoice 1: leave it unpaid. Do you get a friendly reminder on time?
2. Invoice 2: pay it. Do the reminders stop? How long did it take?
3. Invoice 3: pay half. What does the next reminder say?
4. Invoice 4: pause it. Does it really stay quiet?

3. Your 7-day trial plan

Day 1	List every unpaid invoice: the customer, the amount, the due date. Add them up. Write the total down.
Day 2	Ask the questions. Get the price in writing. Write your friendly and firm reminders in your own words.
Day 3	Run the 4 test invoices.
Day 4	Fix the wording. Pick 3 to 5 real late invoices from good customers.
Day 5	Turn on reminders for just those. Read the first ones before they go.
Day 6	Note who paid and who replied. Note any message that sounded too harsh.
Day 7	Compare the unpaid total to Day 1. Keep it, change it, or cancel.

4. Red flags: walk away if you see these

- It keeps reminding people after they paid.
- You cannot change the words, and they sound harsh.
- A fee for each payment that is not on the price page.
- You cannot pause one customer.
- You cannot export your invoices.
- It needs a long contract before you have seen it work.

Tools in our directory for this job

- Unpaid Invoice Reminder
- Plumber Follow-Up Bot
- FreshBooks
- Housecall Pro
- Invoice Coordinator
- Quote Request Kit

Best lists: AI invoicing tools for small business; Billing bots for consultants and coaches. All free kits: busyworkbots.com/test-kits/

Not sure which tool fits? Take the Free Busywork Audit or book a Free Profit Leak Check (TimeGentic runs BusyWorkBots, so this is our own service). We do not test every tool. Prices change; check each maker's site.