Invoice Automations

Notify customers when they have invoices or outstanding balances.

Scenario

If you're tired of driving around trying to collect checks or reminding customers that they have an outstanding invoice, it's time to let JobNimbus do the work for you.

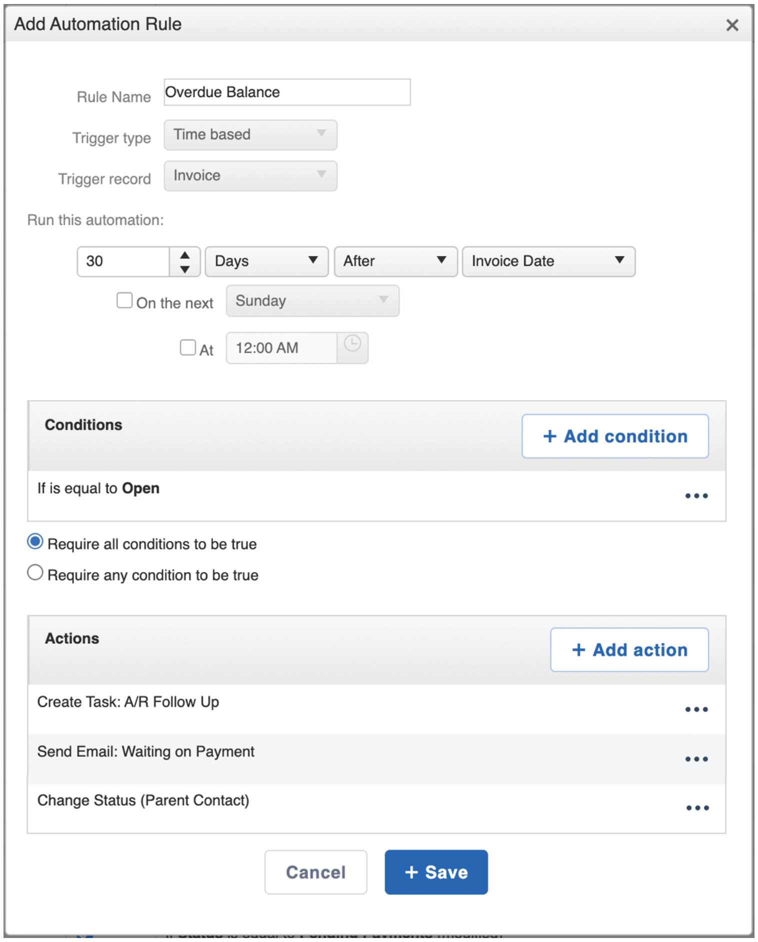
JobNimbus automations around Invoices and Payments allow you to remind customers about outstanding balances, notify your office when large payments are entered, and collect outstanding funds faster.

Setup

In the "Automation" tab within settings:

1. Click "+ Add rule" and create a name.
2. Select "Time based" as the trigger type.
3. Select "Invoice" as the trigger record.
4. Run this automation: "30 Days After Invoice Date".
5. Click "+Add Condition" and select "If Status is equal to Open".
6. Click "+ Add action" and select "Create Task". Name the task and set "Assigned to".
7. "+ Add action" Send an email using a custom "Waiting on Payment" template and send to "All Related Contacts".
8. "+ Add action" and change Contact or Job status to "Overdue Balance".

This automation will notify your team of the overdue account, send an email to the customer letting them know they have an outstanding balance, and move them to a Overdue Balance status for your finance team.



Benefits

- Provide friendly reminders to customers that have outstanding balances.
- Alert your Accounts Receivable team members of overdue balances.
- Easily track account statuses based on invoice status. When invoices are fully paid, they automatically change to "Closed" and do not trigger this automation.
- Provide customers with instructions on how to pay and offer different options if they are behind.
- Automatically change the Job or Contact status to focus your collection efforts.

JobNimbus