

Payment Reminders

A guide to automatic payment reminders: the levels and their texts, when a reminder is sent, promise to pay and hold, the worklist, the email, follow-up tasks and the log.

1. Start here

In plain words: Late payments cost you money and chasing them costs you time. This module **reminds customers of overdue invoices by email, automatically, level by level:** a friendly note after a week, a second reminder after two, a final notice after a month. You write the texts once, in as many languages as you need, and Odoo does the rest, every day.

Partner	Number	Due Date	Days ov...	Amount due	Last reminder level	Last remind...	Next level
Lignacelle	INV/2026/000106	Oct-22	1	\$ 742.00			
Dear Robert	INV/2026/000107	Oct-22	1	\$ 462,112.00			
Overhead	INV/2026/000108	Oct-22	1	\$ 1,798.00			
Northgate Trade	INV/2026/000109	Oct-22	2	\$ 3,900.00			
Cedar Retail Group	INV/2026/000110	Oct-8	18	\$ 3,200.00	Second warn...		
Al Hana Trading	INV/2026/000111	Oct-9	30	\$ 3,400.00	Second warn...		
Summit Interiors	INV/2026/000112	Oct-7	22	\$ 1,400.00	Second warn...		
Cedar Retail Group	INV/2026/000113	Aug-23	30	\$ 1,800.00	Final notice		
Al Hana Trading	INV/2026/000114	Aug-8	45	\$ 11,800.00	Final notice		
Cedar Retail Group	INV/2026/000115	Aug-14	70	\$ 1,200.00	Final notice		
				\$ 78,361.00			

1. Every overdue invoice and its next level

My Company (San Francisco)

Dear Cedar Retail Group,

This is our final notice. 2 invoice(s) totaling \$ 4,000.00 are now 70 days overdue. Unless we receive the payment or hear from you within a few days, we will have to take further steps.

Kind regards,
My Company (San Francisco)

Invoice	Due date	Amount due	Days overdue	
INV/2026/00013	08/14/2026	\$ 1,200.00	70	View and pay
INV/2026/00011	09/23/2026	\$ 2,800.00	30	View and pay

Total overdue: \$ 4,000.00

Sent by My Company (San Francisco).

2. One clear email per customer

Planned Activities

 **Today:** "Follow up the overdue invoices of Cedar Retail Group" for Mia Roberts @
Reminder "Final notice" was sent: 2 invoice(s), \$ 4,000.00 overdue.

☒ Mark Done ☐ Edit ☐ Cancel

3. A task for your collector

The worklist of overdue invoices, the email the customer receives, and the follow-up task for your collector.

Tip: Nothing is sent until you switch it on in the settings. Until then you can read the worklist and send a reminder by hand.

2. What you get

Feature	What it does
Reminder levels	Any number of levels by days after the due date, each with its own subject and text.
Daily schedule	Every day, customers whose invoices reached a new level get one email.
One email per customer	It lists every overdue invoice, with a link to view and pay it.
Promise to pay	Put a date on an invoice: no reminder is sent for it until that date has passed.
No reminders	A tick on the customer stops automatic reminders for it.
Follow-up task	At the levels you choose, a task is planned for your collector.
Languages	Texts and email in the customer's language, Arabic included, right to left.
Worklist and log	All overdue invoices with their next level, and a log of every reminder.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Invoicing (account)
Email	An outgoing mail server
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_payment_reminders.zip` ; unzip it to get the folder `taqnix_payment_reminders` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Payment Reminders** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_payment_reminders --stop-after-init
```

5. The reminder levels

In plain words: Open **Invoicing** → **Configuration** → **Reminder Levels**. Three levels are ready: 7, 15 and 30 days after the due date. Change them, or add your own.

Invoicing Customers Vendors Reporting Configuration						12 17 My Company (San Francisco)	
New Reminder Levels		Q Search...		1-3 / 3			
☐ Days aft...	Level	Email subject		Create a follo...	Company		
☐	7 Friendly reminder	Payment reminder from {company}		☐	My Company (San Francisco)		
☐	15 Second reminder	Second reminder: overdue invoices from {company}		☐	My Company (San Francisco)		
☐	30 Final notice	Final notice: overdue invoices from {company}		☒	My Company (San Francisco)		

Three levels: friendly, second and final.

InvoicingCustomersVendorsReportingConfiguration

1217My Company (San Francisco)

NewReminder LevelsFriendly reminder

1 / 1

Friendly reminder

Days after the due date ?7

Create a follow-up task ?☐

Email subject ?Payment reminder from {company}CompanyMy Company (San Francisco)

MESSAGE

Dear {partner},

We noticed that {count} invoice(s) are past their due date, for a total of {total}. This may have crossed with your payment. If you have already paid, please ignore this message; otherwise we would be grateful if you could arrange the payment.

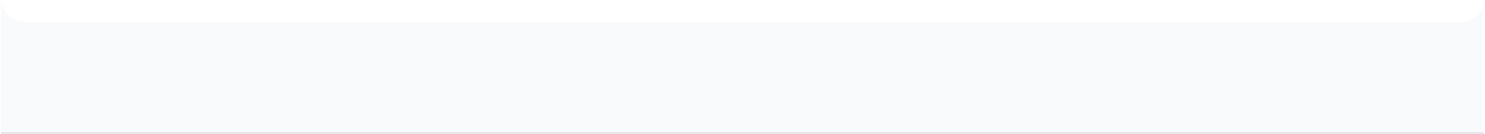
Kind regards,
{company}

You can use {company}, {partner}, {total}, {count} and {oldest}. The list of overdue invoices is added under the message. Switch the language at the top to write the text for another language.

A level: when it is reached, the subject and the message.

Field	Meaning
Days after the due date	The level is reached when an invoice is at least this many days late. Two levels cannot share the same number.
Email subject / Message	The texts of the email. Change the language at the top of the form to write them for another language.
Create a follow-up task	Plans a task for your collector when this level is sent.
Task for	Empty: the salesperson of the customer, or the person who ran the reminder.

Placeholder	Replaced by
{company}	Your company name.
{partner}	The customer's name.
{total}	The amount overdue, in the company currency.
{count}	The number of overdue invoices listed.
{oldest}	The days overdue of the oldest invoice.



6. Settings

In plain words: Open **Settings** → **Payment Reminders**.

Switch the reminders on, the smallest amount, the days between two reminders.

Setting	What it does
Send payment reminders	Switches the daily reminders on for the company.
Only if the overdue amount is above	Customers whose overdue invoices together are below this amount are not reminded.
Days between two reminders	A customer is not reminded again before this many days have passed.

7. When is a reminder sent?

Rule	Detail
A level is reached	An invoice reaches a level when it is at least that many days past its due date.
Once per level	An invoice is reminded once at each level. It moves to the next level only when its days are reached.
One email per customer	If several invoices are late, they are all in one email, at the highest new level.
Promised invoices	An invoice with a promise date in the future is left out.
Customers on hold	Customers with <i>No payment reminders</i> are skipped.
Minimum amount and interval	Small totals are skipped, and a customer is not reminded again within the interval.
Who receives it	The invoice contacts of the customer (contacts of type Invoice address with an email), else the customer's own email address.
No email address	Nothing is sent, it is logged, and the invoice is tried again the next day.

8. The worklist

In plain words: Invoicing → Customers → Overdue Reminders lists every overdue invoice: the days overdue, the last reminder and the level it will reach next.

InvoicingCustomersVendorsReportingConfiguration

1217My Company (San Francisco)

Overdue Reminders

Search...

1-10 / 10

Partner	Number	Due Date	Days ov...	Amount due	Last reminder level	Last remind...	Next level	Promised to...
LightsUp	INV/2026/00008	Oct 22	1	\$ 750.00				
Deco Addict	INV/2026/00002	Oct 22	1	\$ 48,012.50				
OpenWood	INV/2026/00009	Oct 22	1	\$ 1,799.00				
Northgate Foods	INV/2026/00018	Oct 20	3	\$ 3,900.00				
Cedar Retail Group	INV/2026/00012	Oct 8	15	\$ 3,250.00			Second reminder	Oct 28
Al Faris Trading	INV/2026/00017	Oct 3	20	\$ 2,600.00			Second reminder	
Summit Interiors	INV/2026/00020	Oct 1	22	\$ 1,450.00			Second reminder	
Cedar Retail Group	INV/2026/00011	Sep 23	30	\$ 2,800.00			Final notice	
Al Faris Trading	INV/2026/00015	Sep 8	45	\$ 12,500.00			Final notice	
Cedar Retail Group	INV/2026/00013	Aug 14	70	\$ 1,200.00			Final notice	
				\$ 78,261.50				

Before the run: the next level of each invoice.

InvoicingCustomersVendorsReportingConfiguration

1217

My Company (San Francisco)

Overdue Reminders

Q Search...

1-10 / 10

☐ Partner	Number	Due Date	Days ov...	Amount due	Last reminder level	Last remind...	Next level	Promised to...
☐ LightsUp	INV/2026/00008	Oct 22	1	\$ 750.00				
☐ Deco Addict	INV/2026/00002	Oct 22	1	\$ 48,012.50				
☐ OpenWood	INV/2026/00009	Oct 22	1	\$ 1,799.00				
☐ Northgate Foods	INV/2026/00018	Oct 20	3	\$ 3,900.00				
☐ Cedar Retail Group	INV/2026/00012	Oct 8	15	\$ 3,250.00			Second reminder	Oct 28
☐ Al Faris Trading	INV/2026/00017	Oct 3	20	\$ 2,600.00	Second reminder	Oct 23		
☐ Summit Interiors	INV/2026/00020	Oct 1	22	\$ 1,450.00			Second reminder	
☐ Cedar Retail Group	INV/2026/00011	Sep 23	30	\$ 2,800.00	Final notice	Oct 23		
☐ Al Faris Trading	INV/2026/00015	Sep 8	45	\$ 12,500.00	Final notice	Oct 23		
☐ Cedar Retail Group	INV/2026/00013	Aug 14	70	\$ 1,200.00	Final notice	Oct 23		
				\$ 78,261.50				

After the run: the last reminder level and date.

9. The email

Final notice: overdue invoices from My Company (San Francisco)

From: "My Company (San Francisco)" <info@yourcompany.com> To: finance@cedar-retail.example.com

My Company (San Francisco)

Dear Cedar Retail Group,

This is our final notice. 2 invoice(s) totalling \$ 4,000.00 are now 70 days overdue. Unless we receive the payment or hear from you within a few days, we will have to take further steps.

Kind regards,
My Company (San Francisco)

Invoice	Due date	Amount due	Days overdue	
INV/2026/00013	08/14/2026	\$ 1,200.00	70	View and pay
INV/2026/00011	09/23/2026	\$ 2,800.00	30	View and pay

Total overdue: \$ 4,000.00

Sent by My Company (San Francisco).

A final notice in English: your text, the overdue invoices with a link to view and pay each, and the total.

الإنذار الأخير: فواتير متأخرة من My Company (San Francisco)

إلى "My Company (San Francisco)" <info@yourcompany.com> من: accounts@alfaris.example.com

My Company (San Francisco)

السيد/السيدة Al Faris Trading

هذا إنذارنا الأخير. 2 فاتورة بإجمالي \$ 15,100.00 متأخرة الآن 45 يومًا. وما لم نستلم الدفعة أو نسمع منكم خلال أيام قليلة فسنضطر إلى اتخاذ خطوات أخرى.

مع خالص التحية،

My Company (San Francisco)

الفاتورة	تاريخ الاستحقاق	المبلغ المستحق	أيام التأخير	
INV/2026/00015	08/09/2026	\$ 12,500.00	45	عرض وسداد
INV/2026/00017	03/10/2026	\$ 2,600.00	20	عرض وسداد

إجمالي المتأخر: \$ 15,100.00

أرسلته My Company (San Francisco).

The same for an Arabic-speaking customer, with the Arabic text of the level, right to left.

10. On the invoice and the customer

In plain words: On a customer invoice you find **Promised to pay on** and, once a reminder was sent, the level and the date. **Send reminder** sends one now.

New

Invoices

INV/2026/00012 (PO-1210)

1 / 1

<

>

Send

Print

Pay

Preview

Credit Note

Debit Note

Reset to Draft

Send reminder

Draft

Posted

Send message

Log note

Activity

You have outstanding credits listed below for this customer.

Customer Invoice

INV/2026/00012

Customer

Cedar Retail Group

12 Market Street

Leeds

LS1 4AB

United Kingdom

GB123456782

Invoice Date

Sep 8

Due Date

Oct 8

Currency

in

USD

Promised to pay on ?

Oct 28

Invoice Lines

Other Info

Product	Quantity	Price	Taxes	Amount
Consulting and support services	1.00	3,250.00		\$ 3,250.00

Today

OdooBot 11:07 AM

Invoice Created

Promised to pay on: no reminder is sent for this invoice until after that date.

New

Invoices

INV/2026/00011 (PO-1188)

1 / 1

<

>

Send

Print

Pay

Preview

Credit Note

Debit Note

Reset to Draft

Send reminder

Draft

Posted

Send message

Log note

Activity

You have outstanding credits listed below for this customer.

Customer Invoice

INV/2026/00011

Customer

Cedar Retail Group

12 Market Street

Leeds

LS1 4AB

United Kingdom

GB123456782

Invoice Date

Aug 24

Due Date

Sep 23

Currency

in

USD

Promised to pay on ?

Last reminder level

Final notice

Last reminder on

Oct 23

Invoice Lines

Other Info

Product	Quantity	Price	Taxes	Amount
Consulting and support services	1.00	4,800.00		\$ 4,800.00

Today

OdooBot 11:23 AM

Payment reminder "Final notice" sent to finance@cedar-retail.example.com.

OdooBot 11:07 AM

Invoice Created

After the run: the last reminder level and date, and a note in the chatter.

The screenshot shows the Odoo CRM interface for a customer named 'Cedar Retail Group'. The 'Invoicing' tab is selected, showing details for 'GENERAL' and 'CUSTOMER INVOICES'. In the 'GENERAL' section, the 'No payment reminders' checkbox is unchecked. The 'CUSTOMER INVOICES' section shows 'Invoice sending' set to 'e-Invoicing & Email' and 'einvoice format' set to 'XML format'. The 'Planned Activities' sidebar on the right shows a task to follow up on overdue invoices.

On the customer: the Send reminder button and, in the Invoicing tab, the No payment reminders tick.

Button	What it does
Send reminder (invoice or customer)	Sends a reminder now for all the overdue invoices of the customer, at the level the oldest has reached (the first level if none yet). It ignores the schedule, the interval and the hold.

11. The follow-up task

In plain words: Tick **Create a follow-up task** on a level, usually the last one, and a task is planned on the customer for your collector when that level is sent.

CRMSalesReportingConfiguration

1217My Company (San Francisco)

NewCustomersCedar Retail Gr...

Opportunities0Sales0Invoiced\$ 16,400.00Meetings0Tasks0Purchases0Lots/Serial NumbersMore

C

PersonCompany

Cedar Retail Group

finance@cedar-retail.example.com

Phone

Address12 Market Street

Street 2...

LeedsLS1 4ABState

United Kingdom

GSTIN ?GB123456782

Websitee.g. https://www.odoo.com

Language ?English (US)

Tags e.g. "B2B", "VIP", "Consulting", ...

ContactsSales & PurchaseInvoicingNotes

Add Contact

Send messageLog noteActivity

Planned Activities

Today: "Follow up the overdue invoices of Cedar Retail Group" for Mia Roberts

Reminder "Final notice" was sent: 2 invoice(s), \$ 4,000.00 overdue.

Mark DoneEditCancel

Today

OdooBot11:22 AM

None → Mia Roberts (Salesperson)

OdooBot11:11 AM

Statement of account sent to finance@cedar-retail.example.com (Activity, as of 10/23/2026, balance \$ 11,400.00).

OdooBot11:11 AM

Statement of account sent to finance@cedar-retail.example.com (Open items, as of 10/23/2026, balance \$ 11,400.00).

OdooBot11:07 AM

Contact created

The task on the customer: who to call and what was sent.

12. The log

Invoicing Customers Vendors Reporting Configuration					12 17 My Company (San Francisco)		
Reminder Log					Search...		1-3 / 3
Date	Customer	Level Name	Invoices	Overdue	Email	Trigger	Result
Oct 23, 11:23 AM	Summit Interiors	Second reminder	1	\$ 1,450.00		Automatic	No email address
Oct 23, 11:23 AM	Al Faris Trading	Final notice	2	\$ 15,100.00	accounts@alfaris.example.com	Automatic	Sent
Oct 23, 11:23 AM	Cedar Retail Group	Final notice	2	\$ 4,000.00	finance@cedar-retail.example.com	Automatic	Sent

Every reminder: customer, level, invoices, amount, email, and the result.

Tip: Find it in **Invoicing → Reporting → Reminder Log**.

13. Limits

Limit	Detail
Customer invoices only	Credit notes, vendor bills and draft invoices are ignored.
No attachments	The email lists the invoices and links to them; it does not attach the PDFs.
Email only	Reminders are sent by email, not by SMS or WhatsApp.
Company currency for the minimum	The minimum amount is compared in the company currency; the list shows each invoice in its own currency.

14. For developers

In plain words: Skip this chapter if you only use the module.

Item	Details
Engine	<code>taqnix.reminder.engine</code> : <code>_plan(company)</code> says who is reminded, <code>_send(...)</code> sends and logs, <code>_cron_send_reminders()</code> is the daily run.
Invoice fields	<code>tx_reminder_level_id</code> , <code>tx_reminder_date</code> , <code>tx_promise_date</code> , <code>tx_days_overdue</code> , <code>tx_next_level_id</code> .
Customer fields	<code>tx_reminder_hold</code> , <code>tx_reminder_last_date</code> .

```
# who would be reminded today?
plan = env['taqnix.reminder.engine']._plan(env.company)
for partner, (level, invoices) in plan.items():
    print(partner.name, level.name, len(invoices))

# remind a customer now
partner.action_tx_send_reminder()
```

15. Troubleshooting

Problem	What to do
Nothing is sent	Check that Send payment reminders is on, that a level has been reached, and that Odoo's scheduled actions run.
A customer is never reminded	Look for the No payment reminders tick, a promise date, or a total below the minimum amount.
The email did not arrive	Check the log: No email address means the customer has none; otherwise check your outgoing mail server.
The text is in the wrong language	The language comes from the customer's contact form; write the text of the level in that language.
A reminder was sent twice	A different invoice reached a new level, or you used Send reminder by hand.

16. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_payment_reminders` . Your levels and settings are kept. To remove it, uninstall it from Apps: the levels and the log are deleted with it.

17. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Reminder levels by days after the due date, with translatable subject and text
- Daily automatic run: one email per customer listing every overdue invoice, once per level
- Promise-to-pay date, no-reminders switch, minimum amount and interval
- Follow-up task for the collector, log and worklist of overdue invoices
- Send reminder by hand from the invoice or the customer
- Arabic translation, automated tests