

Get paid sooner, without the awkward calls.

Send friendly reminders before and after an invoice is due, with the amount and your payment link, straight from your accounting export.



INSIDE THIS GUIDE

- The moment and why it slips
- A sample conversation
- Message templates to adapt
- Node-by-node build
- How the journey works
- The data you need
- Example sheet
- What to measure

01

At a glance

TEAM

Sales

STARTS FROM

Google Sheets, Zapier

TRIGGER

Your accounting tool's export (or a Zapier connection) adds invoices to a sheet with due dates.

GOAL

Invoices paid sooner, with less time spent chasing.

STOPS WHEN

Invoice marked paid in the sheet, reply received, or the escalation step reached.

LIKELY META CATEGORY

Utility. Meta confirms it when it reviews your template.

02

In practice

Nobody enjoys chasing money, so it gets put off. Friendly, factual reminders before and after the due date, each with the amount and your payment link, get most invoices paid without a phone call, and the journey stops the moment the invoice is marked paid.

03

The moment

THE MOMENT

Twelve invoices are overdue and nobody wants to ring customers about money.

WHY IT SLIPS TODAY

Chasing payments is uncomfortable and time-consuming, so it gets put off, and cash flow suffers.

WHAT CHANGES

Invoices paid sooner, with less time spent chasing.

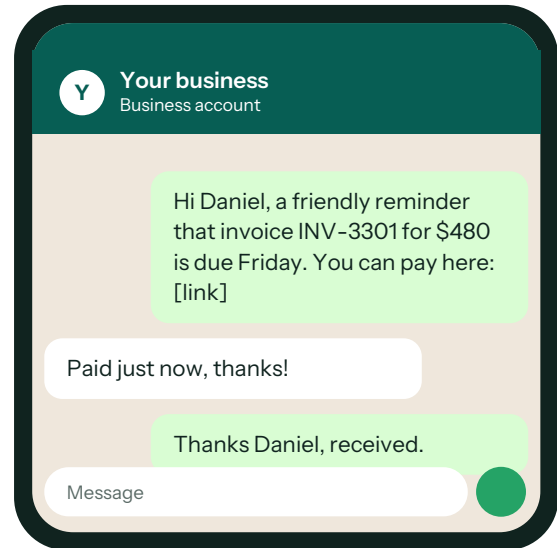
04

How the journey works

The steps on the left, and what your customer sees on the right.

Trigger: Your accounting tool's export (or a Zapier connection) adds invoices to a sheet with due dates.

- 1 **Before due**
A courtesy reminder three days before the due date.
- 2 **On due**
A reminder on the due date with the payment link.
- 3 **Overdue**
A firmer, still friendly reminder a week after.
- 4 **Escalate**
If still unpaid, notify your team to call.



A fictional example. Write templates in your own voice and get them approved by Meta.

Stops when

Invoice marked paid in the sheet, reply received, or the escalation step reached.

05

Data you need

Each item is a column in your Google Sheet, a field from Zapier or a Shopify property. Only the WhatsApp number is required.

- First name
- WhatsApp number
- Invoice number
- Amount
- Due date
- Payment link

06 Set it up in ConvoHut

- [] Export unpaid invoices to a sheet on a schedule, or use Zapier.
- [] Create before-due, due and overdue templates.
- [] Add a paid-status column so paid invoices exit.
- [] Set the escalation notification.
- [] Test with a sample invoice.

07 The message sequence

Example templates. `{{variables}}` are filled from your sheet or store. Submit each one to Meta for approval.

1. 3 days before due (due list)

UTILITY · `invoice_upcoming_v1`

Hi `{{first_name}}`, a friendly reminder that invoice `{{invoice_no}}` for `{{amount}}` is due `{{due_date}}`.
Pay here: `{{pay_link}}`

2. 7 days overdue (due list)

UTILITY · `invoice_overdue_v1`

Hi `{{first_name}}`, invoice `{{invoice_no}}` for `{{amount}}` is now overdue. You can pay here:
`{{pay_link}}`, or reply if there's a problem.

Buttons: Paid already | I have a question

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	invoice_no	amount	due_date	status
Daniel	+614... ..	INV-3301	\$480.00	3 Oct	unpaid
Grace	+614... ..	INV-3302	\$1,120.00	3 Oct	unpaid
Yusuf	+614... ..	INV-3290	\$260.00	24 Sep	overdue

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	Your accounting export adds invoices due in 3 days to one tab.
SEND MESSAGE	invoice_upcoming_v1	
END FLOW		
TRIGGER	New Sheet Row	A second tab for invoices 7 days overdue.
SEND MESSAGE	invoice_overdue_v1	
WAIT FOR REPLY	Timeout: 3 days	
NOTIFY ME	On reply or timeout	Accounts calls if still unpaid.
END FLOW		

10 Branches

ON REPLY

Accounts is notified to confirm payment or resolve the question.

ON TIMEOUT

Accounts is notified to follow up by phone.

ON OPT-OUT

The contact leaves the journey and is excluded from future marketing messages.

11 Mistakes to avoid

- Sending without the amount or a payment link.
- Chasing an invoice that was paid yesterday.
- A tone that sounds like a debt collector.

12 Measure and improve

What to measure

- Invoices reminded
- Paid within 7 days of reminder
- Average days overdue
- Replies needing attention

Good practice

- Be friendly and factual.
- Always include the amount and a way to pay.
- Stop immediately once paid.

13

Variations to try

- Trades and field services
- Schools and course providers
- Clubs and memberships
- B2B suppliers

14

Questions

Is it OK to send payment reminders on WhatsApp?

Payment reminders for a specific invoice are a common utility use, sent to customers who have agreed to receive messages from you.

Can ConvoHut take payments?

No. Include your existing payment link, such as your accounting tool's invoice link.

15

Responsible messaging

Consent first

Only message people who have given you their WhatsApp number and agreed to hear from you. Include a clear way to opt out of marketing messages, honour opt-outs immediately and keep sensitive personal details (such as health information) out of messages.

16

Your next steps

1

Pick a journey

Choose the follow-up with the clearest goal for your business.

2

Connect your data

A Google Sheet, Zapier app or Shopify store. Only the phone number is required.

3

Go live in a week

Get templates approved, test with your own number and switch it on.

READY TO START?

Start your 7-day free trial

Free onboarding, training and Meta verification help on every plan. Connect your number in about 15 minutes.

dashboard.convohut.com · Book a demo: convohut.com/demo