

What this workflow does: Every weekday morning at 8am, it checks your invoice spreadsheet for overdue invoices and automatically sends polite chaser emails on an escalating schedule. Invoices 30+ days overdue get flagged to you for a phone call instead.

The Chase Schedule

Days Overdue	Action	Tone
1-6 days	Gentle nudge email to client	"Just a quick note — invoice X was due on..."
7-13 days	First formal reminder with bank details	"I'd appreciate it if you could arrange payment..."
14-29 days	Second reminder, firmer tone	"This is a second reminder... please prioritise..."
30+ days	Email sent to YOU (not the client) flagging for a phone call	Includes client phone number and full details

Why stop at 30 days? After two email reminders, a third email rarely works. A phone call is more effective and maintains the relationship. The bot flags these to you rather than sending an increasingly aggressive email.

What You'll Need

- A free or paid **n8n** instance (n8n.io cloud or self-hosted)
- A **Google account** with Gmail and Google Sheets
- ~15 minutes to set up

Step 1: Create Your Invoice Spreadsheet

Create a Google Spreadsheet with **two sheets**:

Sheet 1: "Invoices"

Column	Header	Format / Notes
A	Invoice #	e.g. INV-001
B	Client	Company name
C	Contact	Person's first name (used in emails)
D	Email	Client's email for reminders
E	Phone	For 30+ day escalations

F	Amount	Invoice amount (number only, no £)
G	Date Issued	DD/MM/YYYY format
H	Due Date	DD/MM/YYYY format — this is what the bot checks
I	Status	"Unpaid", "Paid", or "Cancelled"

Critical: The Due Date column MUST be in DD/MM/YYYY text format. The bot parses this format specifically. If your dates are in a different format, update the Code node's date parsing.

Sheet 2: "Chase Log"

Column	Header
A	Date
B	Invoice #
C	Client
D	Amount
E	Days Overdue
F	Action Taken

This sheet is auto-populated — every chase action is logged so you have a full audit trail.

Step 2: Import the Workflow

1. Open n8n → **Workflows** → **Import from File**
2. Select `invoice-chaser-workflow.json`

Step 3: Connect Credentials

1. Click any **Google Sheets** node → create or select your Google Sheets OAuth2 credential
2. Click any **Gmail** node → create or select your Gmail OAuth2 credential
3. All nodes sharing the same service will use the same credential

Step 4: Replace Placeholders

Placeholder	Replace with	Found in
YOUR_INVOICE_SPREADSHEET_ID	Your spreadsheet ID from the URL	Sheets nodes
YOUR_EMAIL@company.com	Your email (for escalation alerts)	Escalation + notification nodes
YOUR_NAME	Your name for email signatures	All email templates
YOUR_COMPANY	Your business name	All email templates
YOUR_PHONE	Your phone number	Second reminder template
YOUR_ACCOUNT_NAME	Bank account name	First reminder template
XX-XX-XX	Your sort code	First reminder template
XXXXXXXX	Your account number	First reminder template

Step 5: Test

1. Add a test invoice row with your own email and a Due Date a few days in the past
2. Set Status to "Unpaid"
3. Click **Execute Workflow**
4. Verify you receive the appropriate chaser email
5. Check the Chase Log sheet has an entry
6. Change the Due Date to 31+ days ago and re-run — you should get the escalation email instead

Step 6: Activate

Toggle the workflow to **Active**. It runs every weekday at 8am automatically.

Important Notes

- **Mark invoices as "Paid"** in the spreadsheet as soon as payment arrives — otherwise the bot will keep chasing
- **The bot sends one email per invoice per day** — it won't spam the same client multiple times in one run
- **Gmail limits:** Free Gmail accounts can send 500 emails/day. Google Workspace allows 2,000/day. For most small businesses this is more than enough.
- **Email tone:** The templates are deliberately polite and professional. Customise them to match your voice, but keep them friendly — the goal is to get paid, not burn bridges.

Customisation Ideas

- **Skip weekends/holidays:** The cron is already set to Mon–Fri. Add a filter for public holidays if needed.

- **Different templates per client:** Add a column "Chase Style" (standard/gentle/firm) and route with a Switch node
- **Xero/QuickBooks integration:** Replace the Sheets node with a Xero or QuickBooks node to read invoices directly from your accounting software
- **SMS for escalations:** Add a Twilio node to send yourself an SMS for 30+ day overdue invoices
- **Weekly summary:** Add a second trigger that runs on Fridays, aggregates all overdue invoices, and sends you one summary email

Troubleshooting

Problem	Solution
No emails sent but workflow runs	Check the Invoices sheet has rows with Status ≠ "Paid" and Due Date in the past. Verify date format is DD/MM/YYYY.
Date parsing errors	The Code node expects DD/MM/YYYY. If your dates are different, edit the parsing logic in the Code node.
"Insufficient permissions" on Gmail	Re-authorise the Gmail credential. Ensure the Gmail API is enabled in your Google Cloud project.
Duplicate chasers	The bot runs daily and will chase the same invoice each day it's overdue. This is intentional for nudge-level (1-6 days). For longer periods, consider adding a "Last Chased" column and checking it in the Code node.