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# Collection Email Templates to Get Paid

## Payment Reminders for bank transfer clients

Email template a week before the due date

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## Collection Emails for specific personas

Non-payment follow-up email for the CFO

First invoice reminder email for the sales team

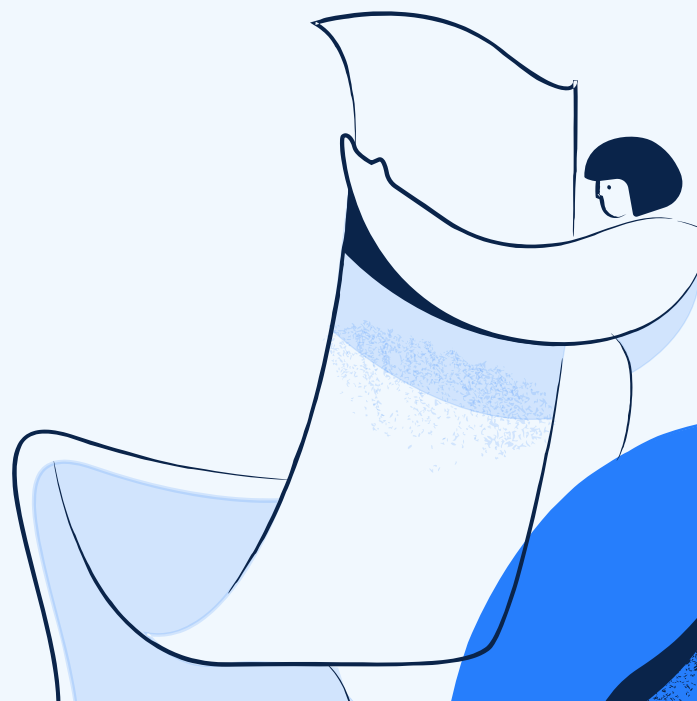
## Other Collection Emails

First email for credit card failure

Follow-up email for late payers

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## Payment Reminders for bank transfer clients

# Email template a week before the due date

In the case of clients who pay by bank transfer, it makes sense to send a collection email before the due date. They can have higher late payment rates, as their invoice payment may not be automated.

**Your invoice [Invoice ID] is due in a week**

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Hello [Client Name],

We hope this email finds you well.

This is a friendly reminder that your invoice [invoice number] of [XXX] is due next week.

You can send payment by [payment instructions].

You will find a copy of the invoice in question attached to this email.

Please let us know if you have any questions or problems.

Best,

[Your Name]

[Your contact info]

## Payment Reminders for bank transfer clients

# Email template a week after the due date

At Upflow, we believe late payments aren't always bad payers. It's often about not having the right technology to pay. That's why we suggest you ask your clients to switch to credit card or automated payments if they currently use bank transfers. It might speed up the process.

**Your invoice [Invoice ID] is now 7 days overdue**

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Hello [Client Name],

We are contacting you as part of our outstanding invoices follow-up. The invoice number [XXX] of [XXX] was due on [due date]. Can you confirm that this invoice has been recorded by your accounting department and give us an estimated payment date?

You will find a copy of the invoice in question attached to this email. To pay this invoice, you can [payment instructions].

You can also choose to switch to credit card payments to automate your future payments. To do so, [specific instructions].

Please also note that your account balance currently stands at [XXX]. If you have already paid, please ignore this notice.

Let me know if you have any questions.

Best,

[Your Name]

[Your contact info]



## Collection Emails for specific personas

# Non-payment follow-up email for the CFO

Some situations call for more drastic actions, like getting the CFO or even the CEO involved in your invoice collection process. Of course, not every late invoice deserves this kind of escalation. But occasionally, it can unblock a situation - especially if it is sent directly to the CFO/CEO of your client's company.

### Regarding your outstanding balance of [Amount due]

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Hello [Client Name],

We are contacting you regarding your outstanding invoices, the total of which amounts to [XXX].

Your oldest invoice is overdue by [XXX] days. As per our T&Cs, we require payment [payment terms].

The final invoice is attached to this email. We would appreciate immediate payment upon reception of this email. You can pay by [payment methods and instructions].

If we haven't received payment by [timeframe], we will regrettably have to [restrict access to our services] and/or take further action soon.

Best wishes,  
[Your Name]  
[Your contact info]

## Collection Emails for specific personas

# First invoice reminder email for the sales team

We believe it's a good idea to involve your sales team or account managers team in collecting payment. That's why Upflow can be used by different users in your company, as we know it increases collaboration and efficiency. The sales team often has an already established relationship with your client. It makes matters easier, especially if your client experiences a problem with your product or service.

Your invoice [\[Invoice ID\]](#) is overdue

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Hello [\[Client Name\]](#),

I hope you are doing well since we last talked [\[mention last connection\]](#).

I am reaching out regarding our first invoice [\[invoice number\]](#) due on [\[invoice due date\]](#). Can you confirm that you have received it?

Let me know if you have any questions regarding our payment processes.

Best wishes,  
[\[Your Name\]](#)  
[\[Your contact info\]](#)

## Other Collection Emails

# First email for credit card failure

Depending on your business model, you might have clients paying you directly via credit card. In a few cases, however, payment can fall through and you have to send an email to explain the issue and offer different payment options.

### Payment failure for [Invoice ID]

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Hello [Client name],

We hope this email finds you well.

Following an issue with your credit card payment, we have not yet received your payment for your invoice [XXX] for a total of [XXX], which is now overdue. You will find a copy of the invoice in question attached to this email.

Could you update your payment method by clicking on this [link]?

Please also note that your account balance currently stands at [XXX].

We would appreciate a prompt payment upon receipt of this email. If you have already paid, please ignore this notice.

Best,

[Your Name]

[Your contact info]

## Other Collection Emails

# Follow-up email for late payers

We all have late payers. While it is a reality of being in business, you can tackle this by sending more invoice reminders, before and after the due date. Another option is to prompt them to switch to automated payment. You can also make sure to carve out some time to give them phone calls.

### Important notice - Invoice [Invoice ID] is 7 days overdue

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Hello [Client Name],

Following up on my previous email, I am contacting you about the outstanding invoice: [invoice number] for [XXX].

As this invoice was due last week, could you update me on its current payment status?

You will find a copy of the invoice attached to this email. As a reminder, you can pay us by [payment instructions].

Best wishes,

[Your Name]

[Your contact info]

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# Who are we?

Meet Upflow, a B2B SaaS company helping companies around the world **improve their invoice collection** process!

Our software manages your Accounts Receivables for you with automated yet **personalized workflows** and integrates in one click (literally) with your existing accounting software.

Get paid quicker and easier! Reduce your late payments by 50%.  
Our features include:

- ✓ **Real-time metrics** on your A/R collection
- ✓ Automated and personalized workflows
- ✓ **Payment portals** adapted to each customer

We integrate directly with different accounting solutions like **QuickBooks**, **Netsuite**, or **Xero** and can also develop specific APIs. Our partnerships with Stripe and Go Cardless streamline payments for your customers.

We have **hundreds of users** around the world, including Front, Lattice, and Productboard and are backed by key investors (YCombinator, eFounders) and leading fintech business angels.

Want to learn more about Upflow?

[Request a demo](#)

