

Easy customer statement and follow-up automation

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SUMMARY

- 1 Get paid faster
- 2 How Odoo can help
- 3 Demonstration
- 4 Conclusion

GET PAID FASTER



In Western Europe, an average of 40.2% of the total value of domestic B2B invoices remained outstanding past the due date



Atradius Payment Practices Barometer 2015

Odoo's follow-up automation

Hassle-free debt collection

Automate you follow-up process



Payment Terms


CREATE IMPORT

- Payment Term
- 15 Days
- 30 Days End of Month
- 30 Net Days
- 30% Advance End 30 Days
- Immediate Payment

Set payment terms per customer



772.90 € Overdue 772.90 Invoiced



Agrolait

Components Buyer Partner / IT Services

Address 69 rue de Namur
Wavre 1300
Belgium

Website <http://www.agrolait.com>

CONTACTS INTERNAL NOTES SALES & PURCHASES **ACCOUNTING**

Sale

Log a followup note

Customer Payment Term	30 Net Days
Total Receivable	772.90
Credit Limit	1000.00

Automate you follow-up process



Due Date is set automatically according to Customer Payment Terms and Invoice Date:

Draft Invoice

Customer [Agrolait, Thomas Passot](#)
69 rue de Namur
1300 Wavre
Belgium

Invoice Date 03/10/2015
Salesperson [Gabriel Demmerle](#)

Payment Term [30 Net Days](#)

INVOICE LINES OTHER INFO

Journal	Customer	Account	101200
	Invoices		Account
	(EUR)		Receivable

Due Date 04/09/2015

Reference/Description
Fiscal Position

Automate you follow-up process



Manage your Follow-Up's easily on the Customer Statement Dashboard:

● **Agrolait**(share)

+32 10 588 558

✉ agrolait@yourcompany.example.com

YourCompany

PRINT LETTER SEND BY EMAIL LOG A NOTE DO IT LATER

Next Reminder: **Auto** MANUAL

Dear Agrolait,

Exception made if there was a mistake of ours, it seems that the following amount stays unpaid. Please, take appropriate measures in order to carry out this payment in the next 8 days.

Would your payment have been carried out after this mail was sent, please ignore this message. Do not hesitate to contact our accounting department.

Best Regards,

Reference number	Date	Due Date	Communication	Expected Date	Excluded	Total Due
INV/2015/0001 ▼	2015-04-01	2015-05-01			<input type="checkbox"/>	772.90 €
INV/2015/0002 ▼	2015-03-10	2015-04-09			<input type="checkbox"/>	133.00 €
Total Due						905.90 €

Total Overdue

905.90 €

Automate you follow-up process



Register the payment directly on the Invoice or through Bank Statement import:

Customer Invoices / INV/2015/0005

EDIT CREATE Print ▾ More ▾

[Bank](#)
Bank

SEND BY EMAIL PRINT SEND BY EMAIL PRINT INVOICE **REGISTER PAYMENT** REFUND INVOICE CANCEL INVOICE

Register Payment ×

Payment Mode	<u>Bank (EUR)</u>	Payment Date	<u>05/17/2015</u> ▾
Payment Amount	<u>772.90</u> €	Memo	<u>Late Payment</u>

VALIDATE or Cancel

IMPORT STATEMENT

DEMO

CONCLUSION

- 1 Total transparency of Outstanding Payments
- 2 Entirely customizable Follow-Up Levels and Templates
- 3 All Follow-Up actions summarized on one clear Dashboard
- 4 Register Customer Payments in several ergonomic ways
- 5 → Get paid faster with Odoo's easy Follow-Up Management!

Thank You

Questions?

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