

Billing reminders: Email Templates Quickstart Guide

- [Email Templates](#)

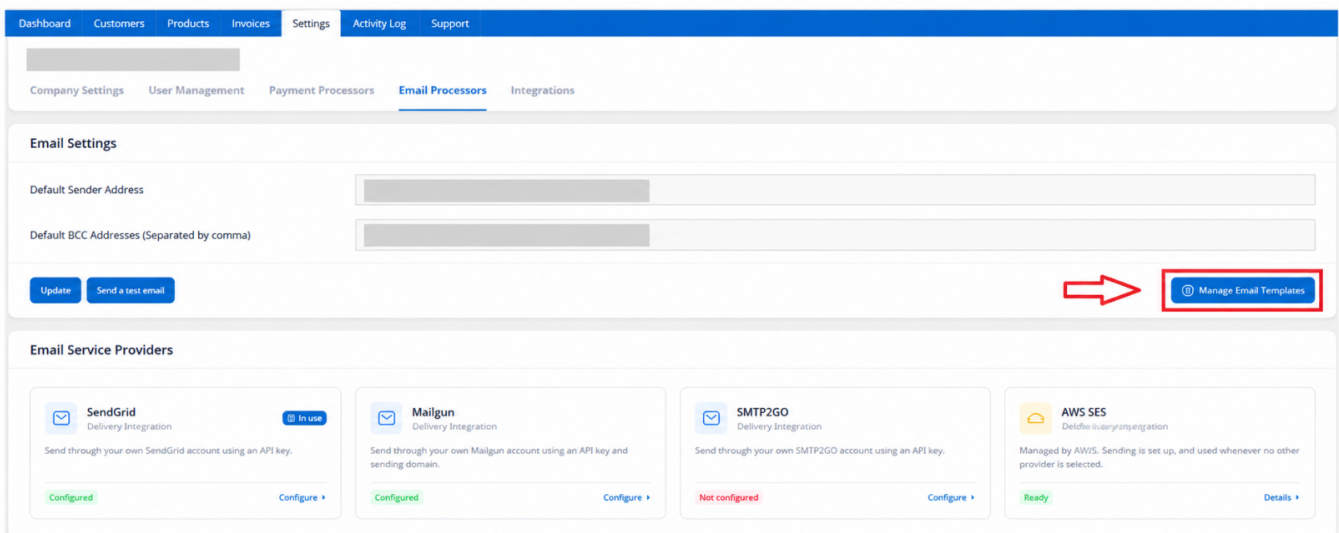
Email Templates

Customize customer emails, test them safely, and send overdue invoice reminders.

FAST START Allow 5–10 minutes. You will need access to Settings and Invoice Reminders in Kwiqli.

1. Customize an email template

Navigation: Settings > Email Processors > Manage Email Templates

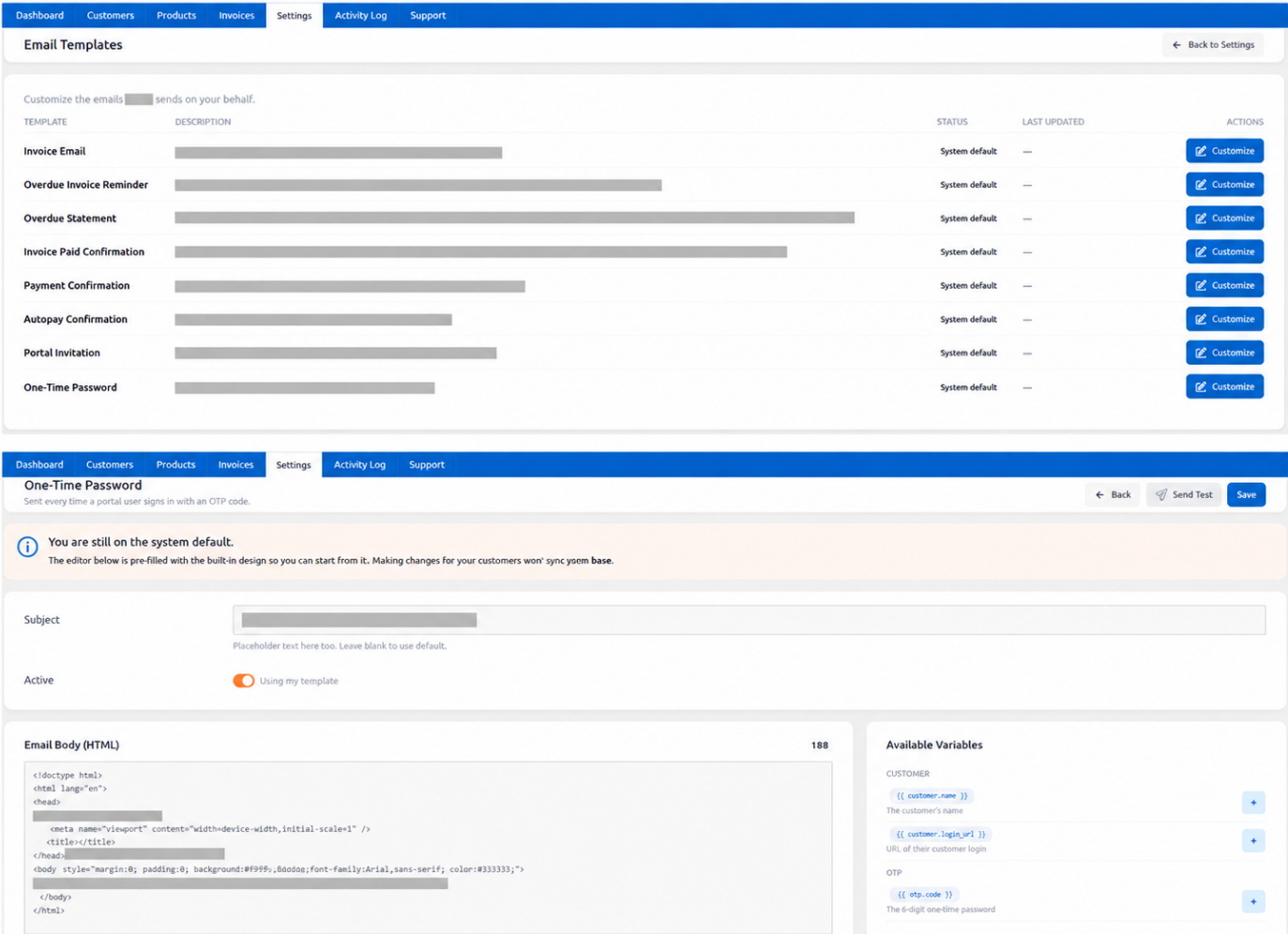


Screenshot 1. Open Email Processors, select Manage Email Templates, then choose Customize.

- Open Manage Email Templates — Select the template you want to update, then click Customize.
- Update the subject and Email Body (HTML) — The message body accepts HTML and Kwiqli variables.
- Insert variables carefully — Use the variables shown beside the editor; keep the original brackets and spelling intact.
- Preview the template — Click Preview to generate a version using sample data.
- Send a test email — Click Send Test and confirm the subject, branding, layout, links, and variable output.

· Save and activate — Save only after the preview and test email look correct. Confirm the template is active if you want Kwiqli to use it.

Edit, preview, and test the template



Screenshot 2. Edit the subject and HTML body, use available variables, then Preview or Send Test before saving.

IMPORTANT Preview uses sample data. Send Test is the final check for how the message renders in an actual inbox.

Pre-send quality check

Company name, sender address, reply-to details, and signature are correct.

All variables resolve; no placeholder text or broken brackets remain.

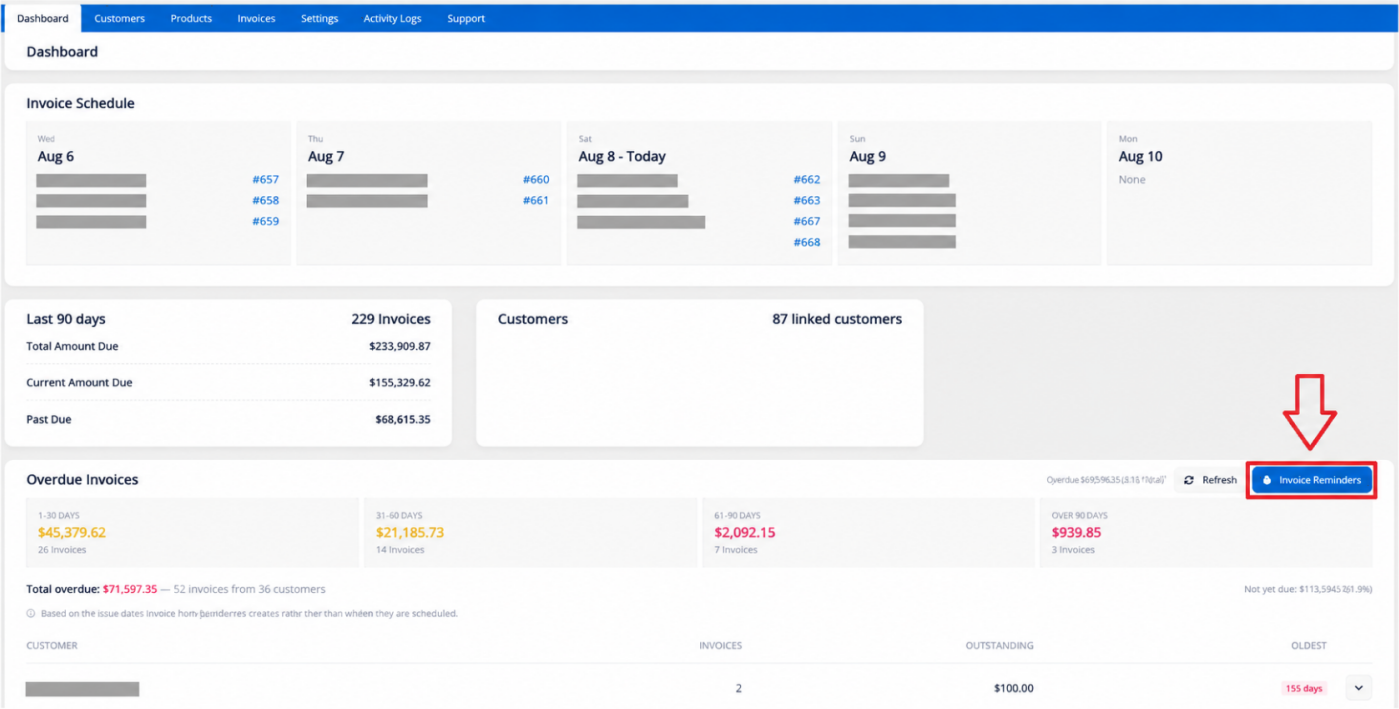
Dates, currency, invoice totals, and payment instructions are accurate.

Links and buttons work on desktop and mobile.

Tone is clear, professional, and appropriate for the email type.

2. Send an overdue invoice reminder

Navigation: Dashboard > Invoice Reminders



Screenshot 3. From the Dashboard, review overdue aging totals and open Invoice Reminders.

- Open Invoice Reminders — Review customers with overdue balances in one consolidated view.
- Review aging and totals — Check the 1-30, 31-60, 61-90, and over-90-day buckets, plus the customer's total outstanding balance.
- Expand the customer — Verify the invoices, due dates, days overdue, and balances that will appear in the statement.
- Click Send Reminder — Review the reminder preview and recipient details before sending.
- Send — Confirm the final email. The Last Reminder field helps you track prior sends.

Review the customer and reminder

DashboardCustomersProductsInvoicesSettingsActivity LogsSupport

Invoice Reminders

← Back to Dashboard

Every customer with an overdue balance, grouped the way a reminder would be sent.

Synced 07/08/2025 9:12 PM AESTRefresh

1-30 DAYS
\$45,379.62
23 invoices

31-60 DAYS
\$23,185.73
16 invoices

61-90 DAYS
\$2,062.15
7 invoices

OVER 90 DAYS
\$939.85
3 invoices

Total overdue: \$71,567.35 — 52 invoices from 30 customers

Not yet due: \$151,545.29 (93)

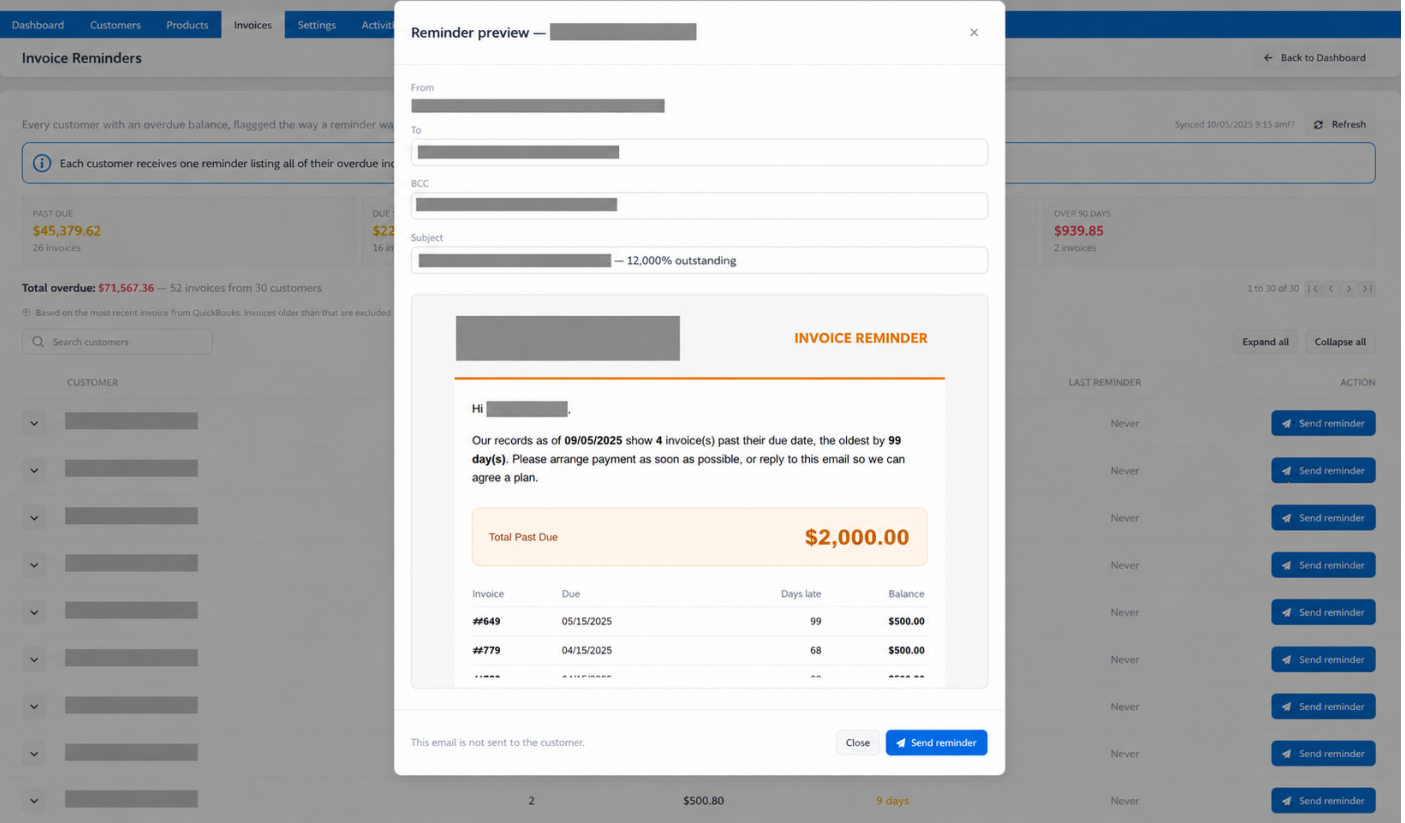
Search and select more invoice from QuickBooks invoice older than last reminder day not to include

Search customer

Expand allCollapse all

CUSTOMER	INVOICES	OUTSTANDING	OLDEST	LAST REMINDER	ACTION
▼ [Customer Name]	2	\$506.80	111 days	Never	Send reminder
▼ [Customer Name]	4	\$2,006.90	91 days	Never	Send reminder
▼ [Customer Name]	2	\$658.91	91 days	Never	Send reminder
▼ [Customer Name]	3	\$606.80	91 days	Never	Send reminder
▼ [Customer Name]	3	\$759.80	71 days	Never	Send reminder
▼ [Customer Name]	3	\$690.80	68 days	Never	Send reminder
▼ [Customer Name]	3	\$1,482.22	68 days	Never	Send reminder
▼ [Customer Name]	3	\$306.80	63 days	Never	Send reminder
▼ [Customer Name]	2	\$506.80	44 days	Never	Send reminder

Screenshot 4. Review customers, outstanding balances, oldest invoice age, and Last Reminder before selecting Send reminder.



Screenshot 5. Confirm the recipient, BCC, subject, invoice details, and total past due in the reminder preview before sending.

HOW REMINDERS WORK Kwiqli sends one reminder per customer—not one email per invoice. The reminder lists all overdue invoices together with due dates, days overdue, and the total outstanding amount.

CURRENT LIMITATION Reminders are sent manually by clicking Send Reminder. Automatic milestone reminders (such as 30, 60, and 90 days past due) are planned but are not currently implemented, and no target date is available.

Before you click Send

Confirm the recipient address and optional BCC address.

Check that all listed invoices are still open and balances are current.

Review recent payments, credits, disputes, or payment arrangements.

Read the subject and message preview for accuracy and tone.

Avoid duplicate follow-ups by checking Last Reminder and account notes.

Quick troubleshooting

Issue	What to do
Variable is blank	Confirm the template supports it and the related customer or invoice data exists.
Layout looks wrong	Simplify the HTML, then Preview and Send Test again.
No automatic reminder	This is expected for now—send it manually from Invoice Reminders.