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Follow Up Reports

Odoo 19 Enterprise · Accounting

Follow Up Reports help you manage overdue customer invoices by tracking who owes what and automating reminder communications.

1 Access follow-up reports

Accounting · **Customers** · **Follow Up Reports**

The follow-up report lists customers with overdue invoices. For each customer you can see: total amount due, total overdue amount, follow-up status, follow-up level, and company. Use the In Need of Action filter to see only customers requiring immediate attention.

2 Read the follow-up report

Click any customer in the list to open their detailed follow-up view. You will see the pre-written reminder letter, the customer's contact details, the next reminder date, and a table of all outstanding invoices with their amounts and due dates.

3 Send a reminder

SEND BY EMAIL

Three delivery options are available from the follow-up report: Send By Email sends the reminder letter with outstanding invoice details. Send By Post prints a physical letter. Send By SMS sends a short message to the customer's mobile number. Review and edit the letter before sending.

Print the letter · Click Print Letter to generate a PDF of the reminder letter for physical signing or filing without sending it electronically.

4 Schedule the next reminder

REMIND ME LATER

If you want Odoo to remind you to follow up again on a specific date, click Remind Me Later and set the next reminder date. Odoo will resurface this customer in the follow-up report on that date.

5 Reconcile directly from the report

RECONCILE

If the customer claims to have already paid, click Reconcile to open the reconciliation view for that customer. Match the outstanding invoice against any unreconciled payment in the system.