KIT 02 · GET PAID

Get Paid

Turn unpaid invoices into a daily routine instead of a monthly argument.

10-MINUTE SETUP EXCEL OR GOOGLE SHEETS UPDATED OCT 2026

01 WHAT THIS KIT PROTECTS

Most contractors do not have a collection problem. They have a follow-up problem. The ladder puts a specific action and a specific email on every invoice at day 1, 7, 14, 21, 30, 45 and 60.

02 WHAT THE AUTOMATION WATCHES

- Invoices past due and their aging bucket
- The next action for every open invoice
- Invoices that crossed 30 and 60 days

03 YOUR FILES

Workbook	Playbook	Setup guide
Invoices · Follow-up ladder · Summary	This document — setup, ladder, emails	Deadline-365-Document-Pack.pdf

04 SET UP IN 10 MINUTES

1. Replace the sample invoices with your open book.
2. Set the real due date from the contract terms, not the send date.
3. Work the Next action column every morning; send from the ladder tab.
4. Connect the workbook in Deadline 365 and choose who gets the 07:00 digest.
5. On Radar, let the automation send day 7, 14 and 21 for you.

05 WHAT CHANGES

DAY ONE

Every invoice has a real, contractual due date.

WEEK ONE

The 07:00 digest names the next call.

MONTH ONE

Nothing sits past 30 days without a named owner.

QUARTER ONE

Days sales outstanding falls and the monthly argument stops.

> **Included with every Deadline 365 account.** Nine workbooks, eight playbooks and the verified 57-jurisdiction rule set. Free accounts run every check in the app and see every result; email sending and extra recipients are Radar and All 8 features.

06 THE RHYTHM

WHEN	WHAT YOU DO	WHAT THE AUTOMATION DOES
Daily 07:00	Open the digest	Lists every invoice whose next action is due today, with the email ready
Monday	Work the 30+ column	Escalates anything past 30 days to the owner
Friday	Update payments	Recalculates aging and clears paid rows

07 THE LADDER

TRIGGER	ACTION	WHO
Day 0	Invoice due	—
Day 1	Confirm receipt and resend backup	Email
Day 7	Ask for the approval date	Email
Day 14	Name the approver; ask for a dated commitment	Email + call
Day 21	State the contract clause and the consequence	Email
Day 30	Owner-to-owner escalation; offer a plan	Call
Day 45	Written demand; preserve lien rights	Certified mail
Day 60	Hand to counsel	Counsel

08 THE EMAILS

Invoice {number} — approval date?

Hi {name}, invoice {number} for {amount} was due {date}. Can you confirm it is approved, and give me the date it is scheduled to pay? If it is waiting on someone, tell me who and I will send the backup directly.

Past due: invoice {number}

Hi {name}, invoice {number} is now {days} days past due. Under section {clause} of our agreement, payment was due within {terms} days. Please confirm a payment date today so we do not have to pause work on {project}.

09 GUARDRAILS

- Never threaten a lien or a lawsuit you are not prepared to file.
- Keep every promise you make about stopping work — or do not make it.
- The Free plan does not send email. The scripts are yours to copy and send manually.

Your next step. Open Deadline-365-Document-Pack.pdf, connect this workbook on the Connect page, and turn on the Get Paid check. Stuck? support@thermoneural.com answers in one business day.